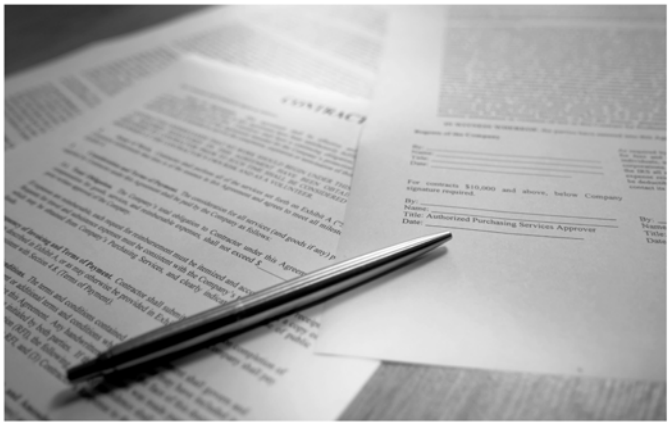

ProcServe

xchangewales (Value Wales)
User Manual Release 4.6

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Software Version: 4.6.0

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1

About this Guide

1 About this Guide

1.1 Introduction

The aim of this guide is to give you a comprehensive guide on how to use the xchangewales system effectively.

Who is ProcServe?

ProcServe is a Commerce Network. It connects buyers and suppliers together via a fully hosted eCommerce infrastructure. ProcServe particularly specialises in providing and managing eProcurement and eInvoicing solutions and services for customers.

What does ProcServe offer?

- ProcServe offers packaged Commerce Solutions to enable our customers of all sizes and technical capabilities to connect to the Commerce Network
- All of our solutions are provided as software-as-a-service, with no requirement for capital investment in IT infrastructure

What do our solutions consist of?

The ProcServe solutions are a blend of world-class application Commerce Modules, all hosted and managed by ProcServe, combined with professional service packages that ensure a swift implementation and maximum return on investment.

The ProcServe Commerce Network

ProcServe offers two types of services, **commerce solutions** and **commerce services**. Regardless of what back office infrastructure organisations have, ProcServe implements only those trading solutions needed to complete their ability to conduct electronic transactions between buyer and supplier. ProcServe also provides services in order to implement these commerce solutions and exploit their capability. The level of services provided are entirely flexible.

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2
xchangewales Marketplace

2 xchangewales Marketplace

2.1 xchangewales Getting Started

2.1.1 Logging on to xchangewales

1. Navigate to the xchangewales URL:

https://buyers.procserveonline.com/otis

You will be presented with the log in screen:

OTIS
Login
Username
Password
Login
Forgotten your password? | Forgotten your username?
The ProcServe marketplace is made available to only registered members. By logging in members are agreeing to the Acceptable Use Policy. For more information please visit www.procserve.com
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2. Enter your username and password:

Tip! You will have received these via email. It is sometimes easier to copy and paste the system generated password.

OTIS
Login
Username
buyeradministrator@ot001
Password
Login
Forgotten your password? | Forgotten your username?
The ProcServe marketplace is made available to only registered members. By logging in members are agreeing to the Acceptable Use Policy. For more information please visit www.procserve.com
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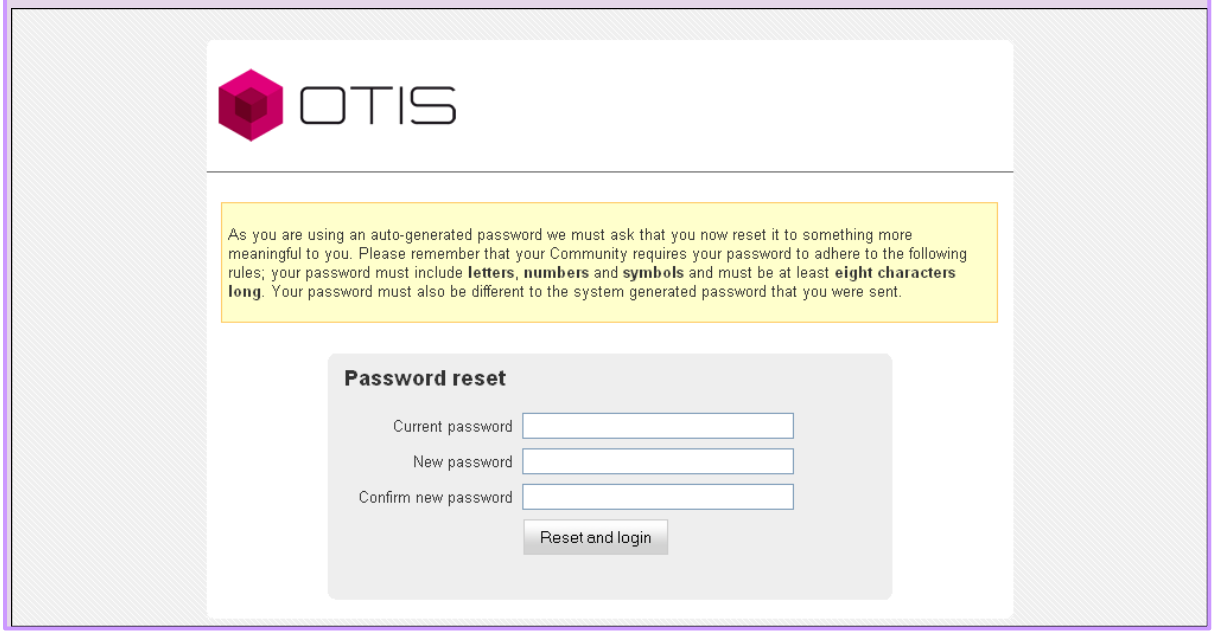
Tip! If this is the first time you have logged in - you will be asked to reset your password and create a memorable word. The memorable word is used to reset your account should you lock it through multiple incorrect log in attempts:


OTIS
As you are using an auto-generated password we must ask that you now reset it to something more meaningful to you. Please remember that your Community requires your password to adhere to the following rules; your password must include letters, numbers and symbols and must be at least eight characters long. Your password must also be different to the system generated password that you were sent.
Password reset
Current password
New password
Confirm new password
Reset and login

You will see the home page:

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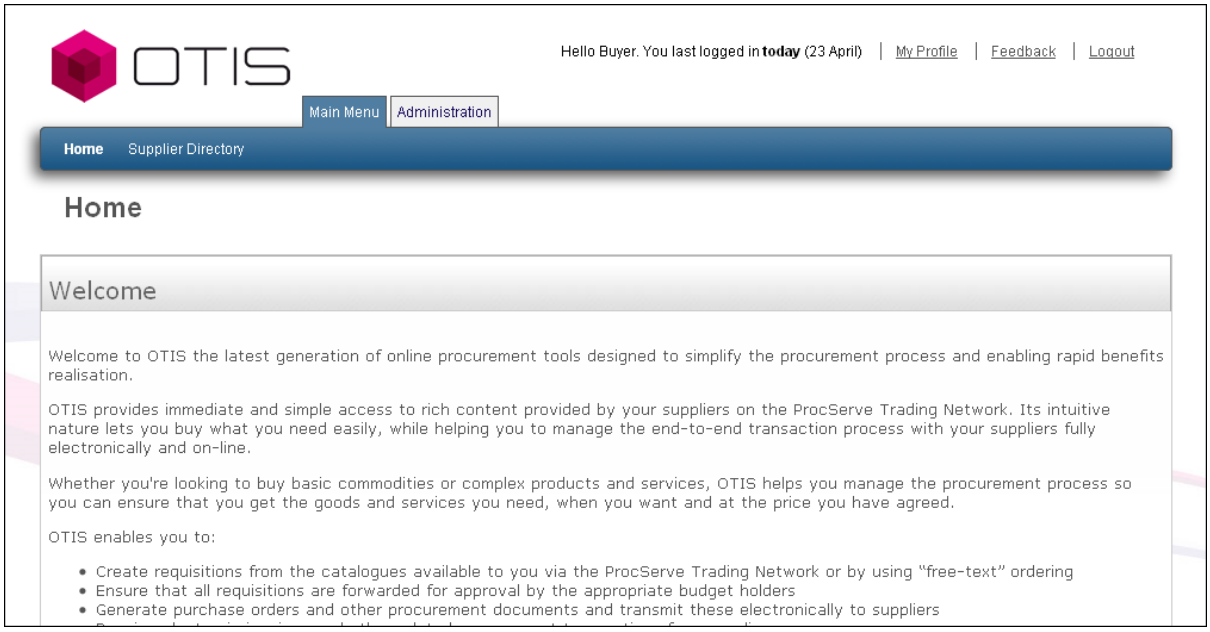
OTIS
Hello Buyer. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

Note: The menus that you are presented with will depend on the roles your user has been given.

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2.1.2 Retrieving a Lost Password

Overview

Should you forget your password, you can generate a system password which will be emailed to your registered account.

Retrieving a lost password

1. Navigate to the xchangewales URL:

https://buyers.procserveonline.com/otis

You will be presented with the log in screen:

OTIS
Login
Username
Password
Login
Forgotten your password? | Forgotten your username?
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2. Click on the 'Forgotten your password?' link at the bottom of the page:

OTIS
Login
Username
Password
Login
Forgotten your password? Forgotten your username?
The ProcServe marketplace is made available to only registered members. By logging in members are agreeing to the Acceptable Use Policy. For more information please visit www.procserve.com
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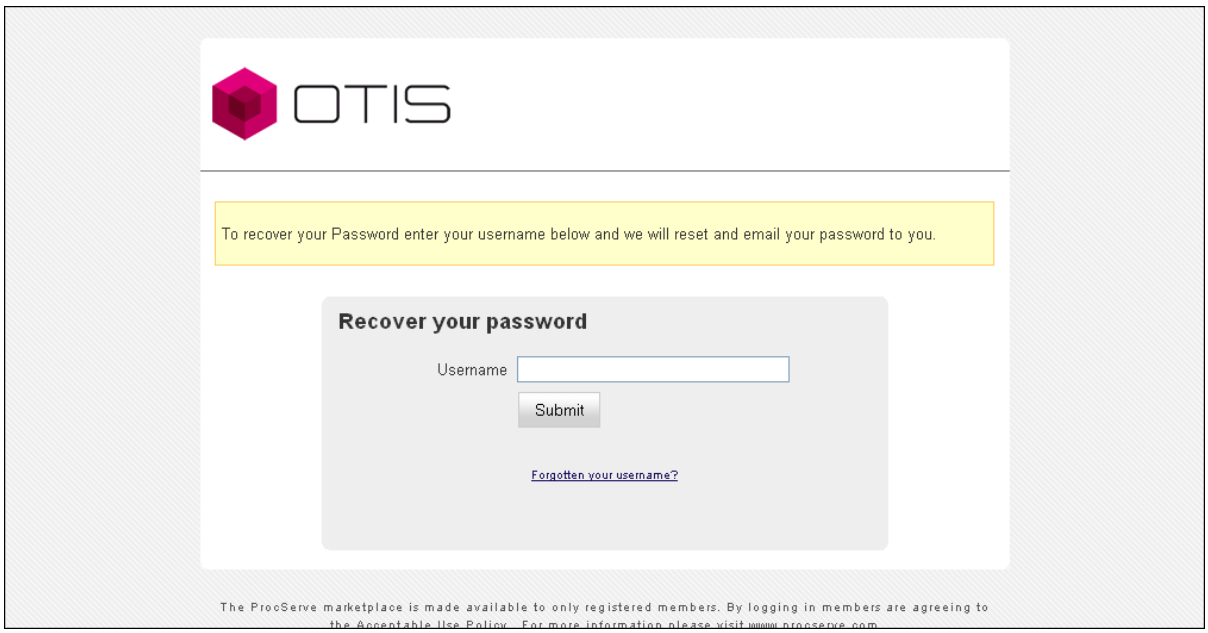
3. Enter your username:


OTIS
To recover your Password enter your username below and we will reset and email your password to you.
Recover your password
Username
Submit
Forgotten your username?
The ProcServe marketplace is made available to only registered members. By logging in members are agreeing to

4. Click 'Submit'

Note: Your password will be sent to you via email. The next time you log in you will have to change it from the system generated password.

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2.1.3 Retrieving a Lost Username

Overview

Should you forget your username, you can request a reminder which will be emailed to your registered account.

Retrieving a lost username

1. Navigate to the xchangewales URL:

https://buyers.procserveonline.com/otis

You will be presented with the log in screen:

OTIS
Login
Username
Password
Login
Forgotten your password? | Forgotten your username?
The ProcServe marketplace is made available to only registered members. By logging in members are agreeing to the Acceptable Use Policy. For more information please visit www.procserve.com
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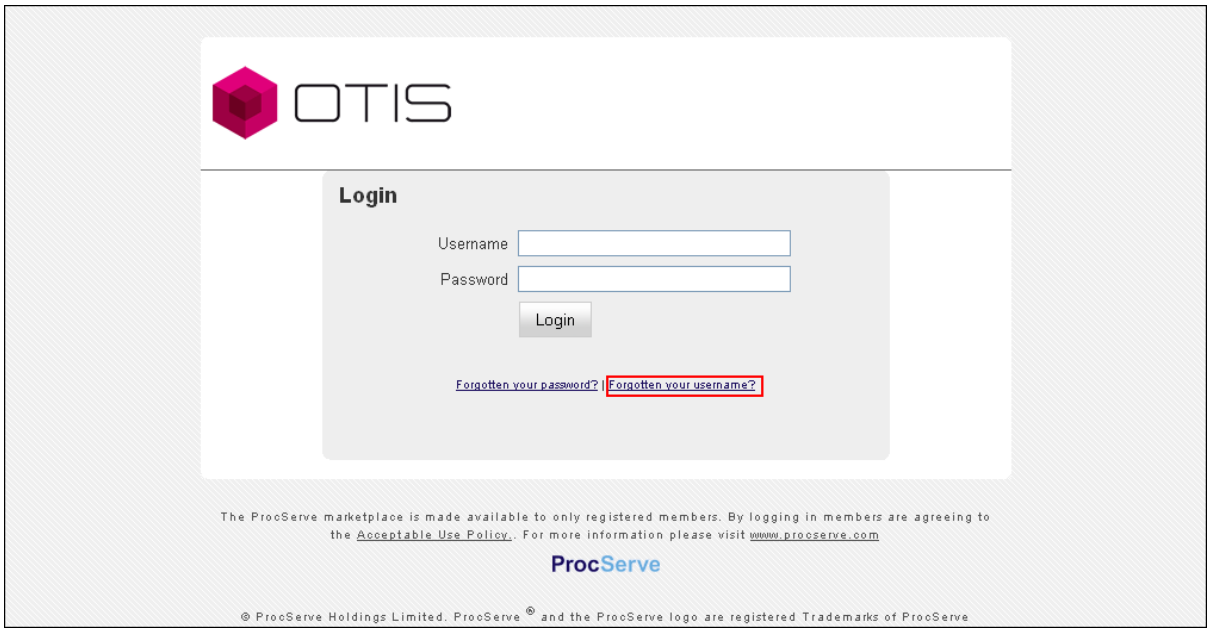
2. Click on the 'Forgotten your username?' link:


OTIS
Login
Username
Password
Login
Forgotten your password? | Forgotten your username?
The ProcServe marketplace is made available to only registered members. By logging in members are agreeing to the Acceptable Use Policy. For more information please visit www.procserve.com
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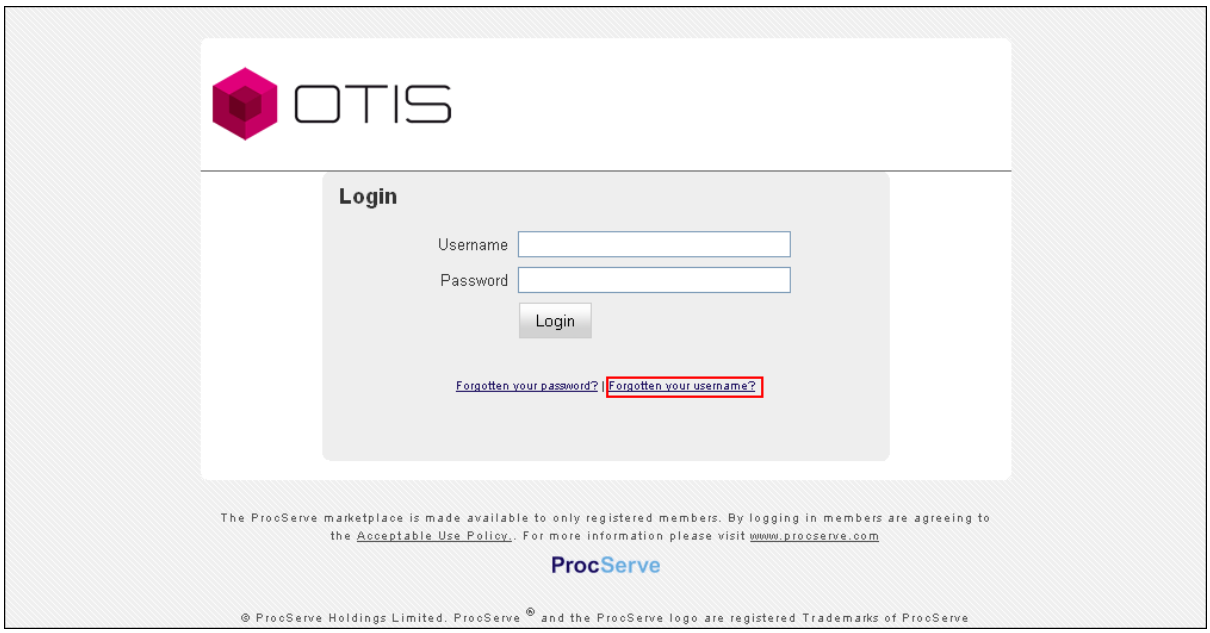
3. Enter your email address:


OTIS
Login
Username
Password
Login
Forgotten your password? | Forgotten your username?
The ProcServe marketplace is made available to only registered members. By logging in members are agreeing to the Acceptable Use Policy. For more information please visit www.procserve.com
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4. Click 'Submit'

Note: Your username will be sent to you via email.

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2.1.4 Navigating Around xchangewales

Overview

When you first log in to xchangewales you will land on the homepage. Below is a brief description of where you need to navigate to in order to access the various features of xchangewales.

Note: The menu options and features that you have will depend on your organisation and the role that you have been given.

The Hompage

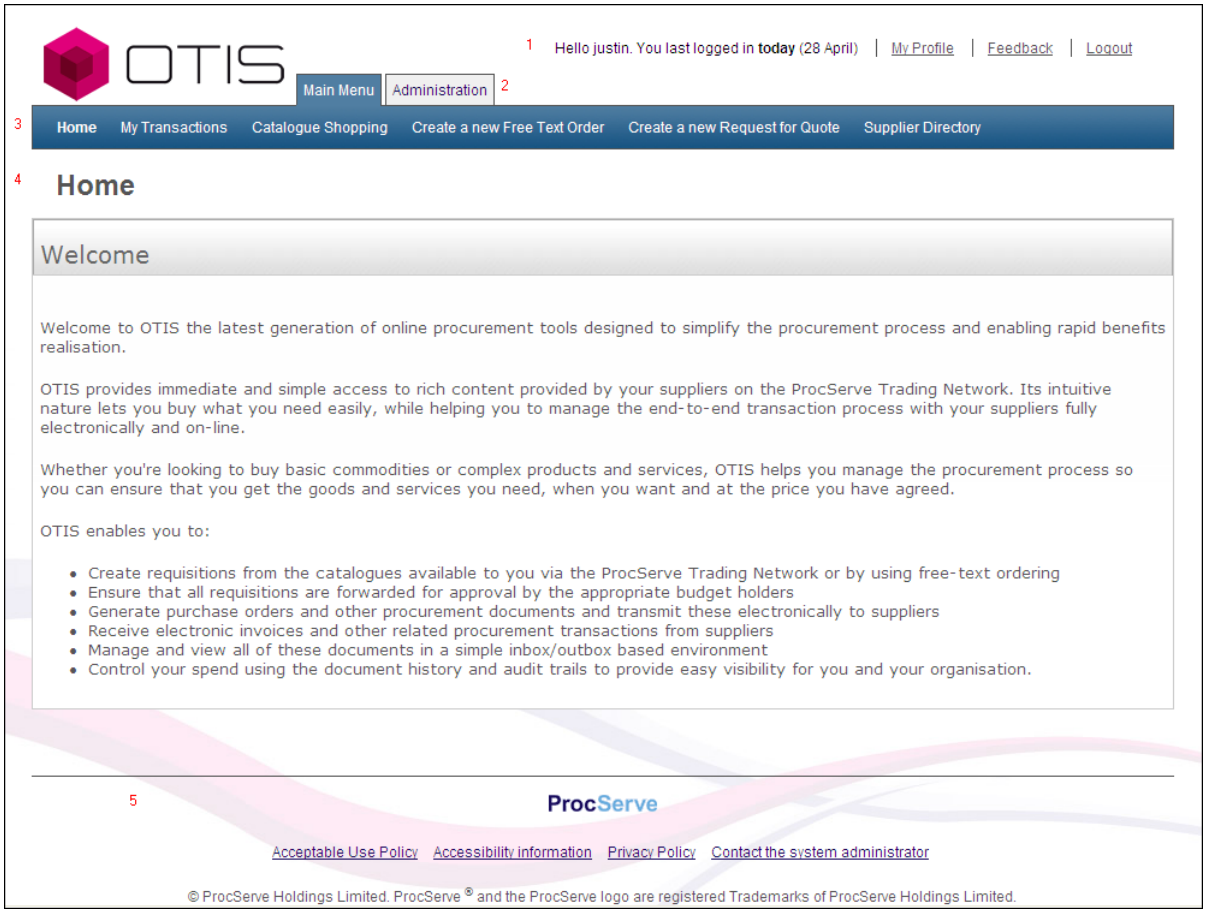
1] Header - from here you can change your profile and password, give feedback on xchangewales and log out of xchangewales.

2] Menu tabs - the two options are 'Main Menu' and 'Administration'. These are described later in this section.

3] Menu options - once selected you can view a variety of other menus which are described later in this section.

4] Menu body - the detail of the area where you can complete your required task.

5] Footer details - ProcServe privacy and accessibility details as well as some useful contact information of the xchangewales administrators.


OTIS
1
Hello justin. You last logged in today (28 April) | My Profile | Feedback | Logout
Main Menu
Administration
2
3
Home
My Transactions
Catalogue Shopping
Create a new Free Text Order
Create a new Request for Quote
Supplier Directory
4
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using free-text ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers
Receive electronic invoices and other related procurement transactions from suppliers
Manage and view all of these documents in a simple inbox/outbox based environment
Control your spend using the document history and audit trails to provide easy visibility for you and your organisation.
5
ProcServe
Acceptable Use Policy
Accessibility information
Privacy Policy
Contact the system administrator
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Main Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Home - shows the homepage and any news feeds

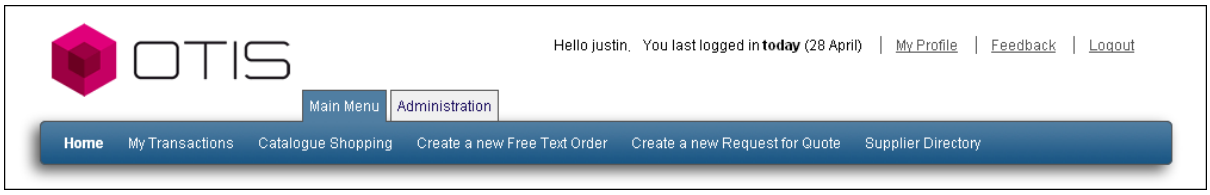
2] My Transactions - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

3] Catalogue Shopping - You can access the marketplace and shop for catalogue items.

4] Create a new Free Text Order - You can shop for non catalogue items. This tool provides a method to keep all transactions within xchangewales.

5] Create a new Request for Quote (RFQ) - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

6] Supplier Directory - Supplier Directory allows you to view all suppliers registered on the ProcServe Trading Network who are available in your marketplace.



Administration Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Community Management - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

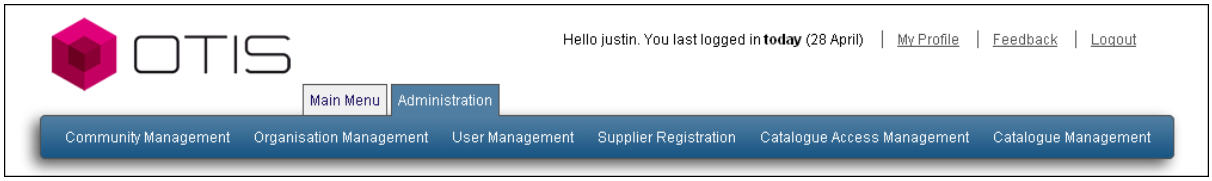
2] Organisation Management - You can view and edit the the general address details of your organisation in 'Organisation Management'.

3] User Management - You can add, edit and deactivate users within your organisation in 'User Management'

4] Supplier Registration - You can manage your supplier adoption in 'Supplier Registration'

5] Catalogue Access Management - You can determine which organisations and users can see what content in 'Catalogue Access Management'

6] Catalogue Management - You can upload and manage your catalogue content in 'Catalogue Management'



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2.1.5 My Profile

Overview

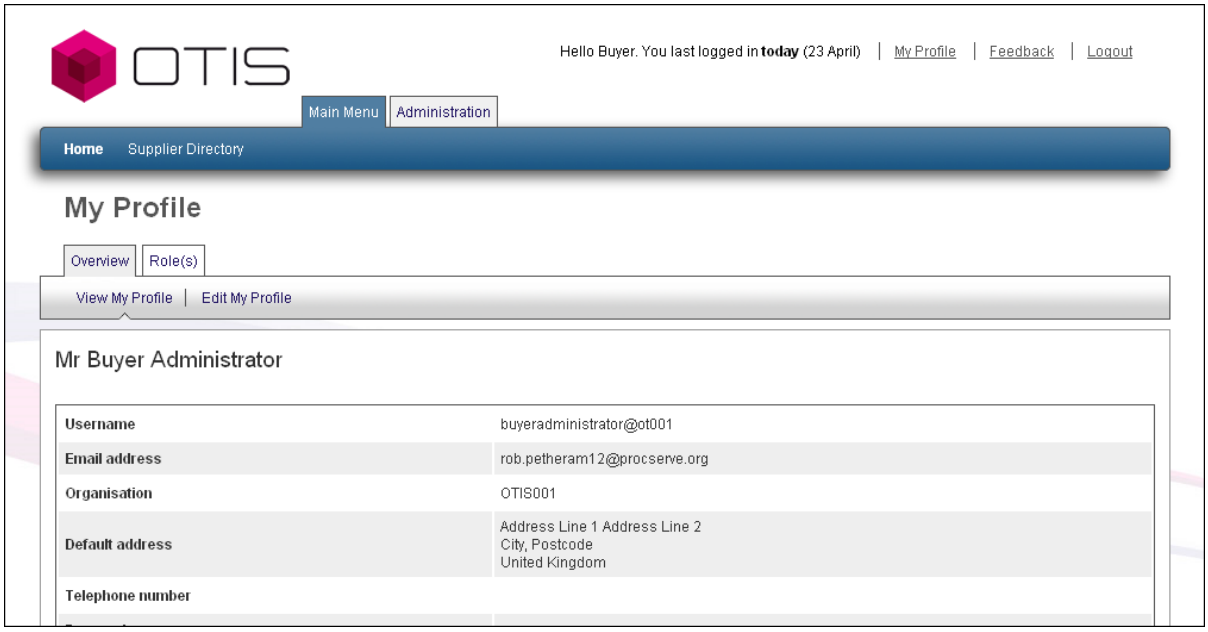
Within the My Profile you can edit your general details and view the roles that you have.

Note: Dependant on the roles you have been given you may not be able to see all functions in the below screenshots.

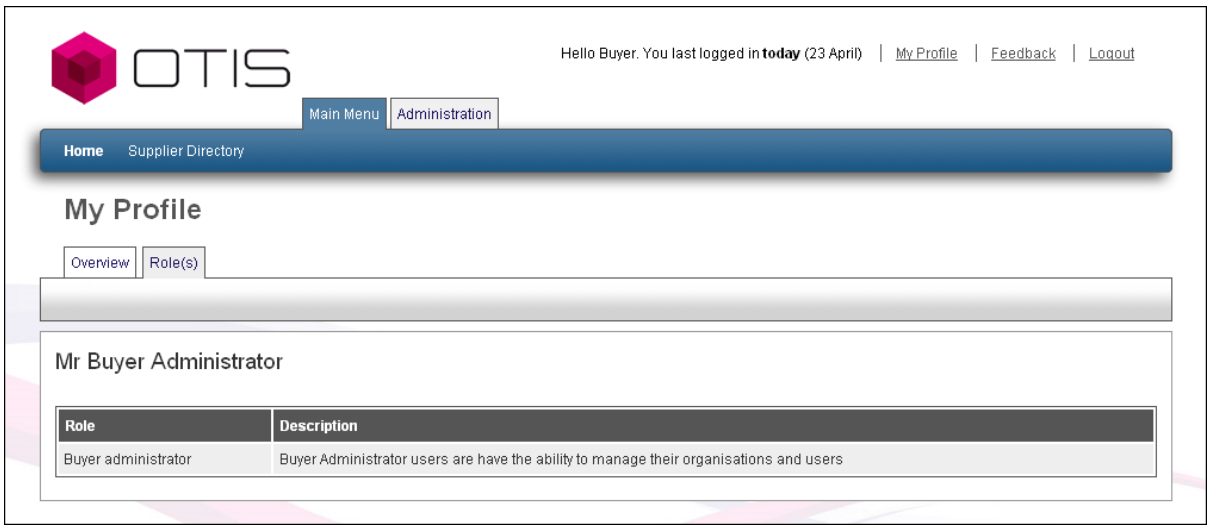
Viewing My Profile

1. Click on 'My Profile' from any page within xchangewales

You will be taken to the overview page where you can view and edit your basic details.



You can view any of the tabs and the details within them by clicking on the tab. By clicking on the 'Roles' tab you can view the roles that you have been given.



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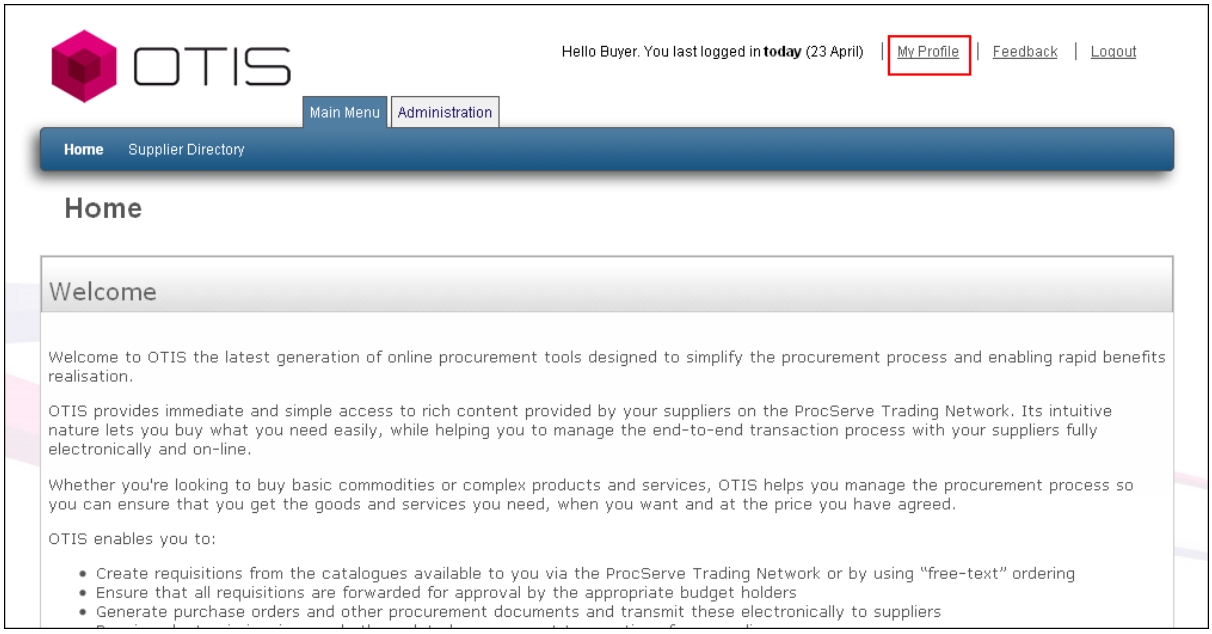
2.1.5.1 Editing My Profile

Overview

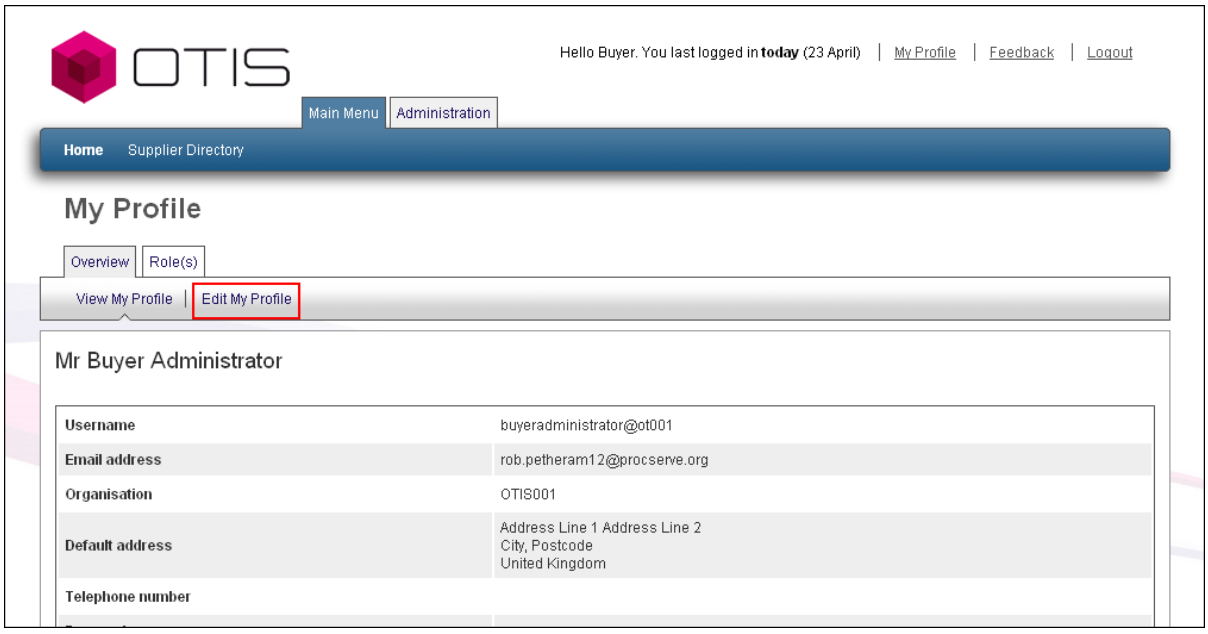
You can update your basic details on your profile.

Editing my profile

1. Click on 'My Profile' from any page within xchangewales


OTIS
Hello Buyer. You last logged in today (23 April)
My Profile
Feedback
Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click on 'Edit My Profile'



3. Edit the features you wish to change

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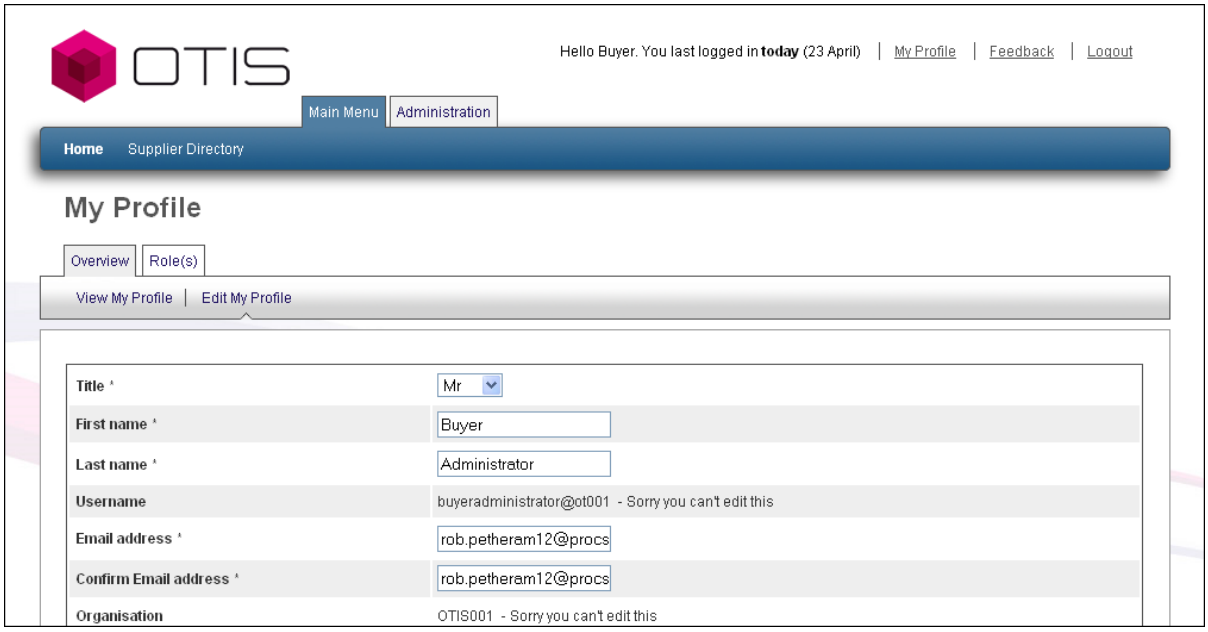
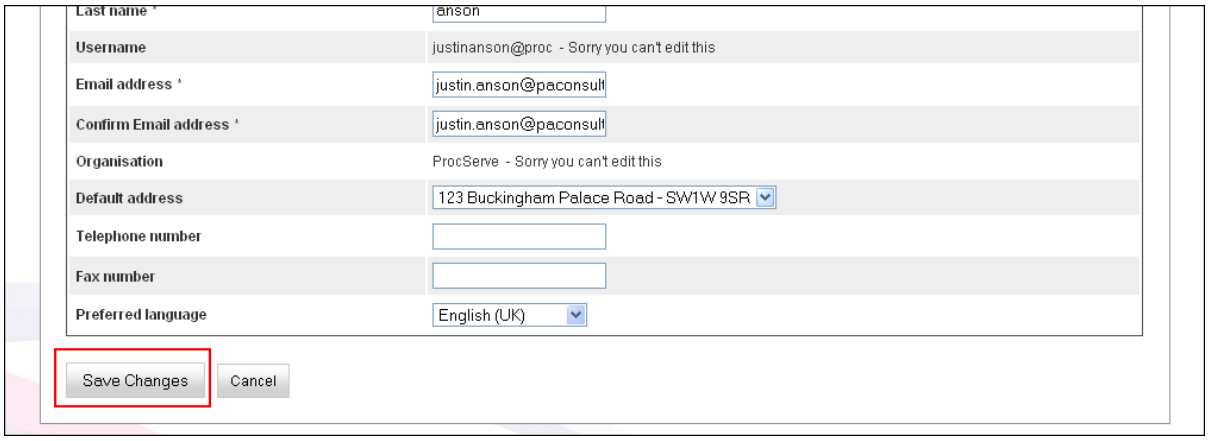


4. Once complete, click 'Save Changes'



Note: If you wish to cancel your changes, click 'Cancel'

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2.1.6 Unlocking your Account

Overview

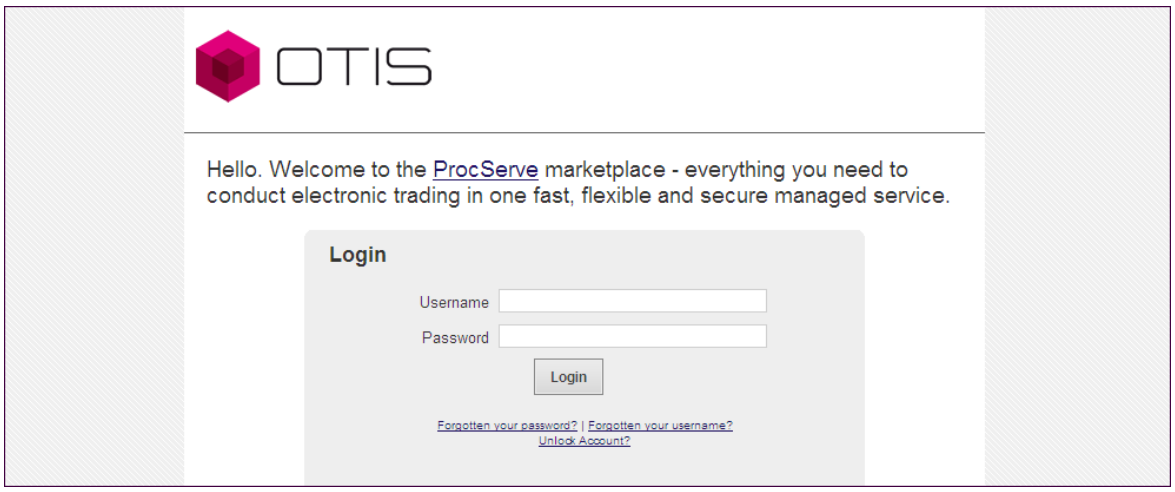
Your account will be locked if you enter your log in details incorrectly 3 or more times. You will be informed that your account has been locked via an email. You can unlock your own account using your memorable word and the access code contained in the email.

Unlocking your account

1. You will receive an email informing you your account has been locked. Within the email are the details you require to unlock your account:

```
Subject: Your  account has been locked.

Hello

Your account has been locked due to too many invalid login attempts.  To unlock your
account you will need both a username and access key (included below) and you will
need your memorable word, which you specified in your account profile.

Your access key is: D8C4DJD4

Instead of typing the access key out try copying and pasting it into the unlock screen, using the following steps:
- Highlight the access key making sure there are no spaces at the beginning or end
- Right click and select 'Copy'
- In the access key field of the login screen right click again and select 'Paste'

You can unlock your account at:

https://preprod-buyers.procserveonline.com/procserveportal/auth.html
```

2. Navigate to the url within the email or use the 'Unlock account?' on the login page:


OTIS
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
Username
Password
Login
Forgotten your password? | Forgotten your username?
Unlock Account?

3. Enter your username and the access key provided in the email:

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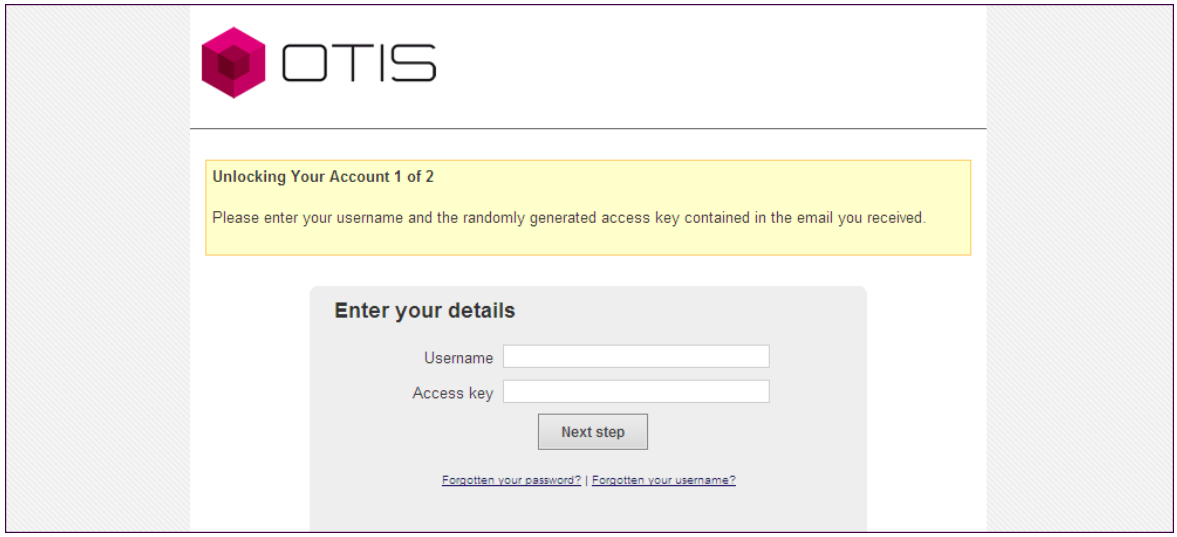
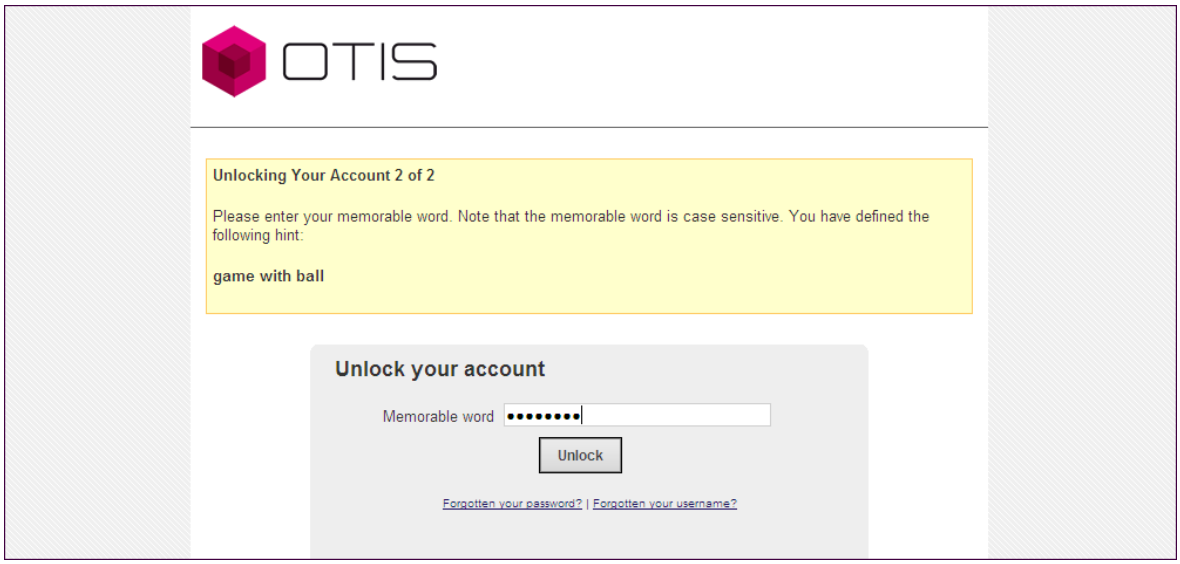

OTIS
Unlocking Your Account 1 of 2
Please enter your username and the randomly generated access key contained in the email you received.
Enter your details
Username
Access key
Next step
Forgotten your password? | Forgotten your username?

4. Enter the memorable word. You hint will be displayed in the instructions window:


OTIS
Unlocking Your Account 2 of 2
Please enter your memorable word. Note that the memorable word is case sensitive. You have defined the following hint:
game with ball
Unlock your account
Memorable word
Unlock
Forgotten your password? | Forgotten your username?

5. Your account is unlocked. If you do not remember your password you can request a new one which will be emailed to you.

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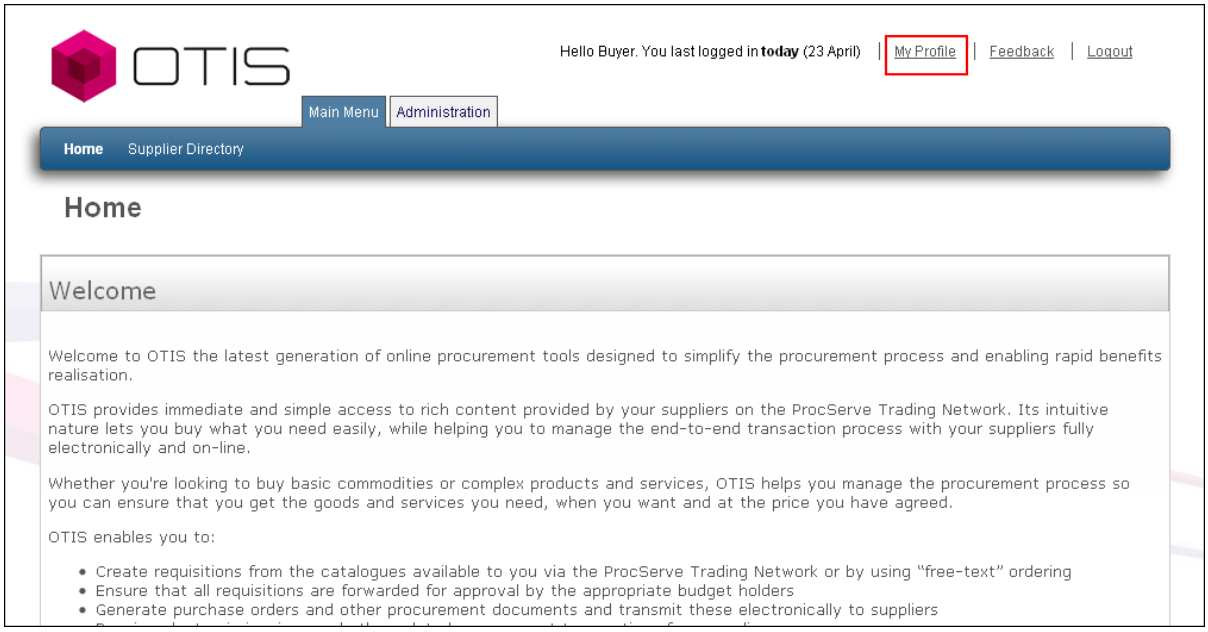
2.1.7 Changing My Password

Overview

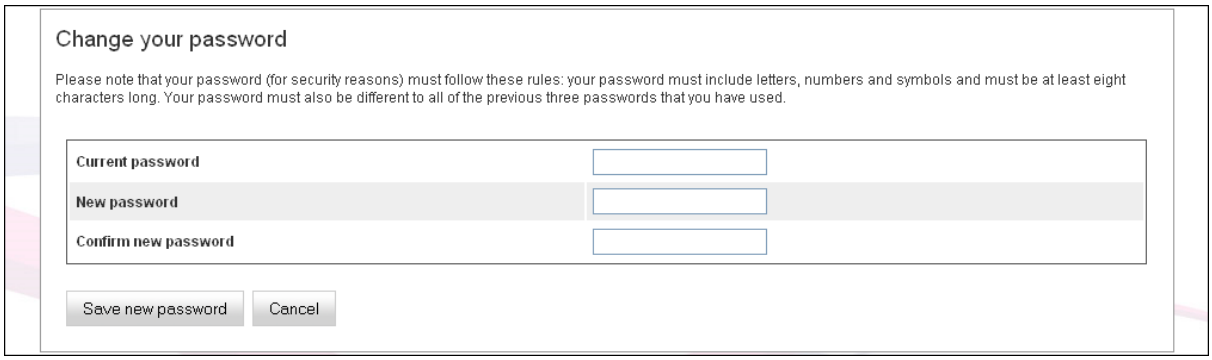
You can change your password at any time within 'My Profile'

Changing my password

1. Click on 'My Profile' from any page within xchangewales


OTIS
Hello Buyer. You last logged in today (23 April)
My Profile
Feedback
Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. On the overview screen, scroll down to the 'Change your password' area


Change your password
Please note that your password (for security reasons) must follow these rules: your password must include letters, numbers and symbols and must be at least eight characters long. Your password must also be different to all of the previous three passwords that you have used.
Current password
New password
Confirm new password
Save new password
Cancel

3. Enter your old password and what you wish to change it to.

Note: Be aware of the password restrictions within your marketplace that are narrated above the password change fields

4. Click 'Save new password' to save the changes

Note: You can cancel the changes by clicking the 'Cancel' button.

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2.1.8 Giving Feedback on xchangewales

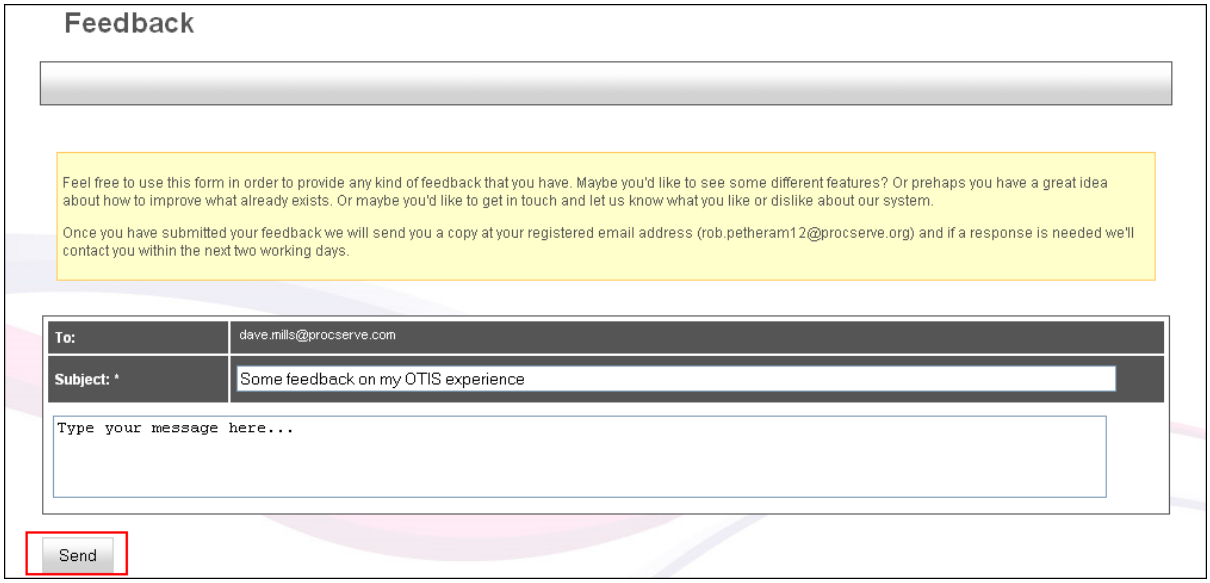
Overview

You can use the feedback section to provide ProcServe with feedback on the system.

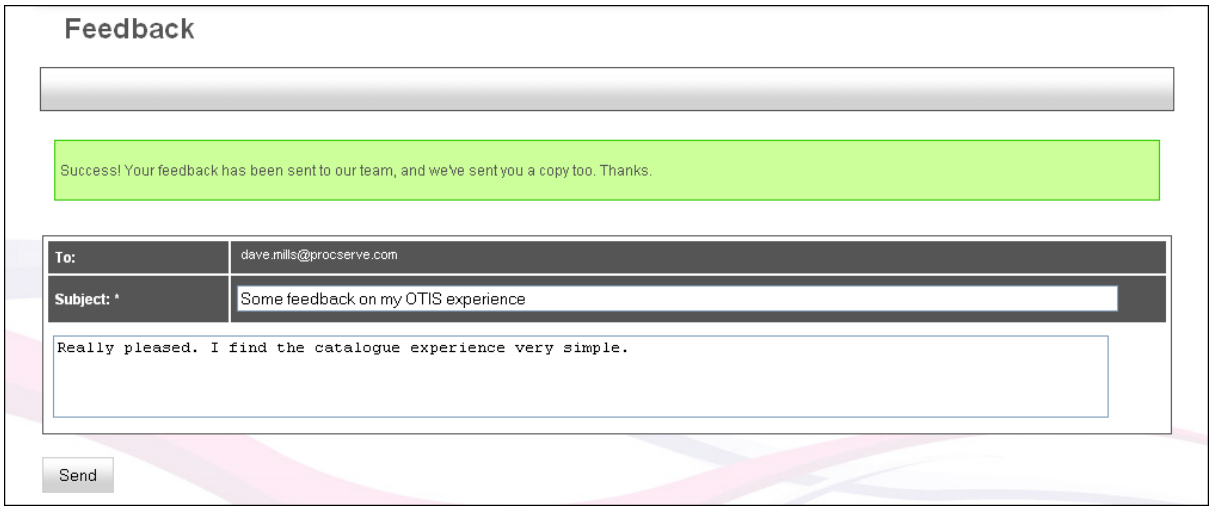
Providing feedback

1.From any screen within xchangewales click 'Feedback':

2. Enter your feedback notes and subject in the box provided:


Feedback
Feel free to use this form in order to provide any kind of feedback that you have. Maybe you'd like to see some different features? Or prehaps you have a great idea about how to improve what already exists. Or maybe you'd like to get in touch and let us know what you like or dislike about our system.
Once you have submitted your feedback we will send you a copy at your registered email address (rob.petheram12@procserve.org) and if a response is needed we'll contact you within the next two working days.
To:
dave.mills@procserve.com
Subject: *
Some feedback on my OTIS experience
Type your message here...
Send

3. Click 'Send'


Feedback
Success! Your feedback has been sent to our team, and we've sent you a copy too. Thanks.
To:
dave.mills@procserve.com
Subject: *
Some feedback on my OTIS experience
Really pleased. I find the catalogue experience very simple.
Send

Your message has now been sent to the system administrators.

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2.2 xchangewales Main Menu

2.2.1 Overview

Main Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Home - shows the homepage and any news feeds

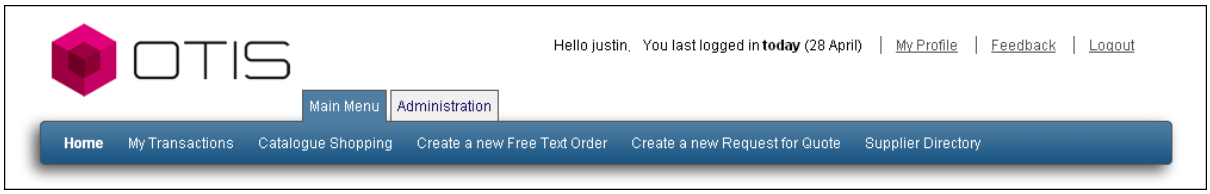
2] My Transactions - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

3] Catalogue Shopping - You can access the marketplace and shop for catalogue items.

4] Create a new Free Text Order - You can shop for non catalogue items. This tool provides a method to keep all transactions within xchangewales.

5] Create a new Request for Quote (RFQ) - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

6] Supplier Directory - Supplier Directory allows you to view all suppliers registered on the ProcServe Trading Network who are available in your marketplace.



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2.2.3 Creating a Request for Quote

2.2.3.1 Introduction to RFQ

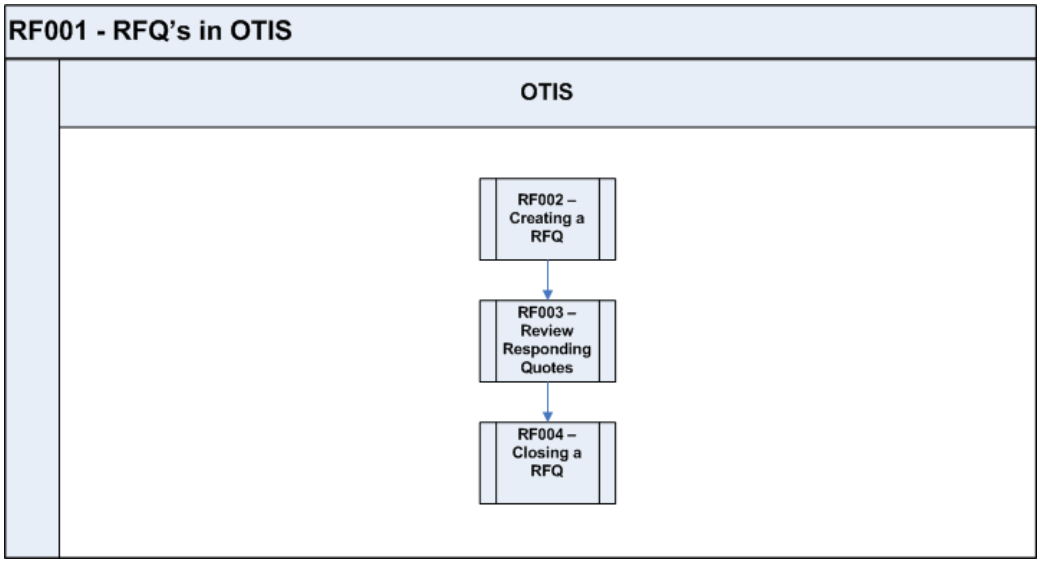
Overview

You can use OTIS to send Request For Quotes (RFQ's) to suppliers that are members of your trading community or marketplace. In addition, OTIS allows all responding Quotes from these suppliers to be linked to the originating RFQ for audit trail purposes.

Responding Quotes that are selected as wining bids are automatically converted to Purchase Orders so no re-keying of data is required.

Note: You may not be able to complete an RFQ if you do not have the required roles.

Note: You should always consider your organisations procurement rules before undertaking an RFQ.



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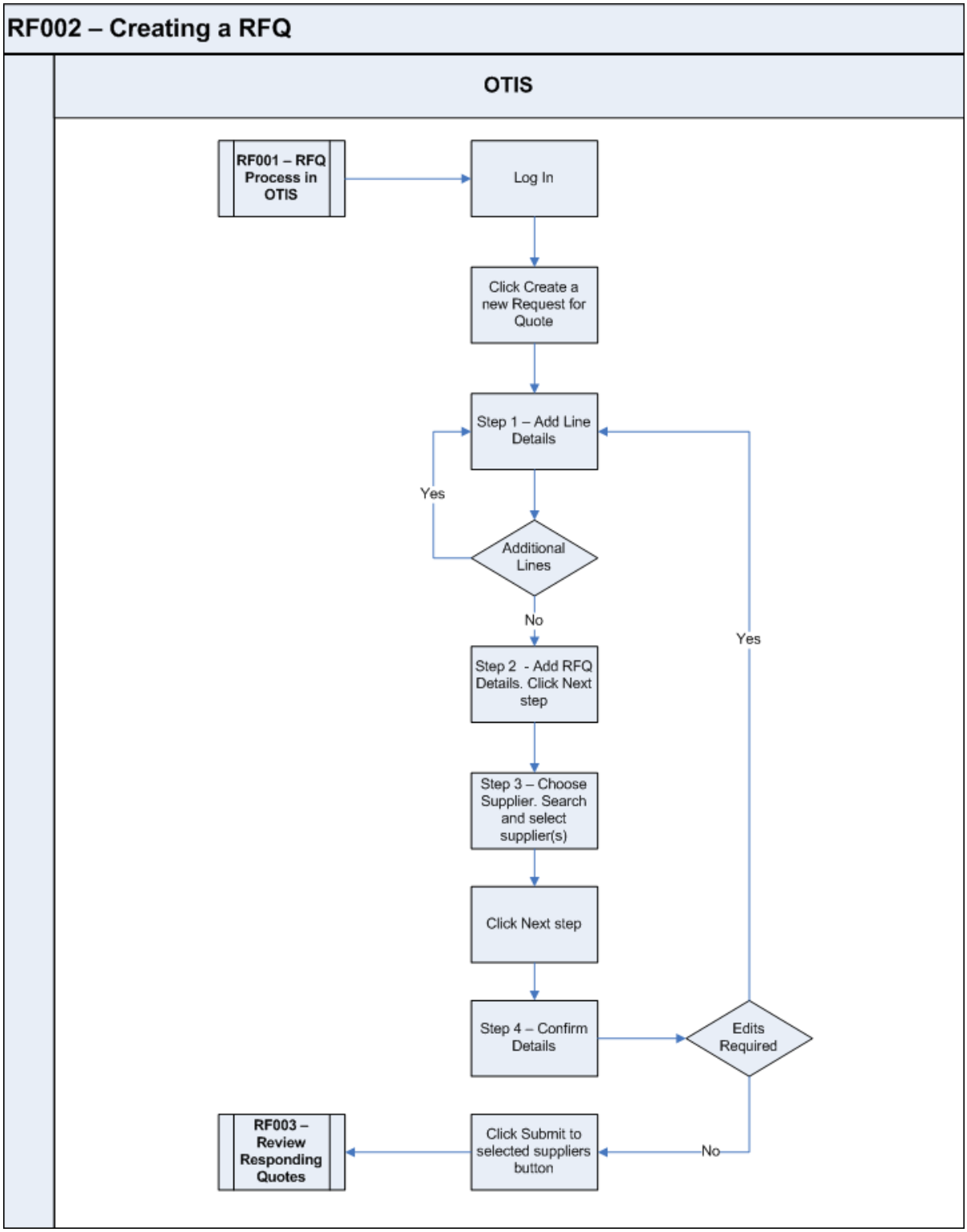
2.2.3.2 Raising a Request for Quote

Overview

This section shows how you can create a Request for Quote.


RF002 – Creating a RFQ
OTIS
RF001 – RFQ Process in OTIS
Log In
Click Create a new Request for Quote
Step 1 – Add Line Details
Yes
Additional Lines
No
Step 2 - Add RFQ Details. Click Next step
Step 3 – Choose Supplier. Search and select supplier(s)
Click Next step
Step 4 – Confirm Details
Edits Required
Yes
No
Click Submit to selected suppliers button
RF003 – Review Responding Quotes

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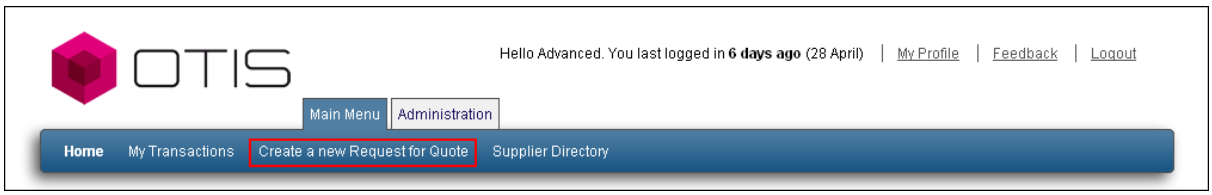
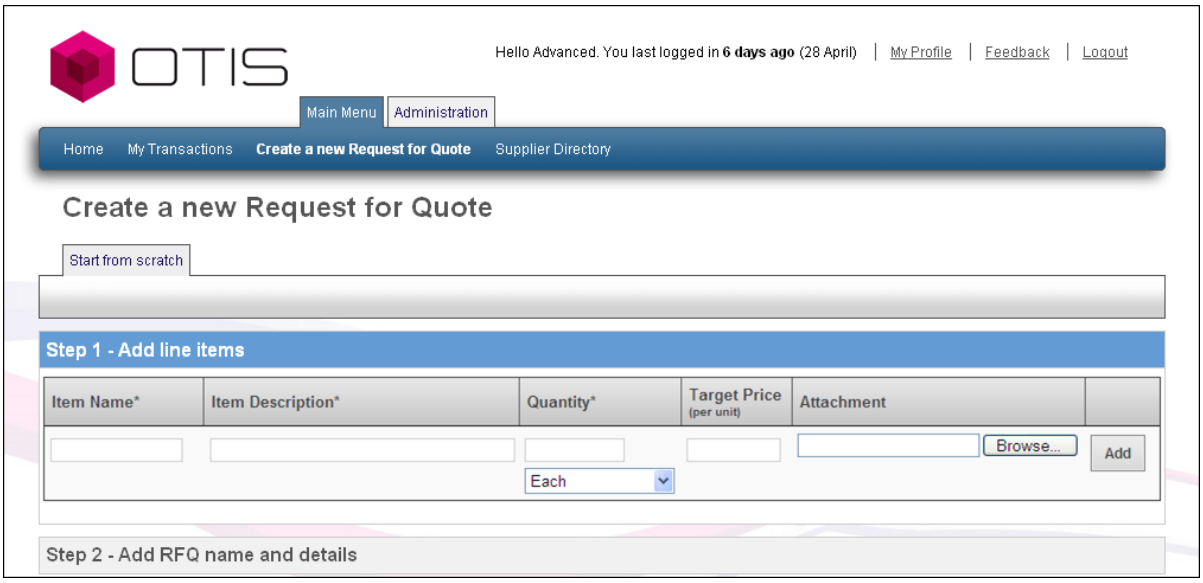
Creating an RFQ

1. Log in to xchangewales.

2. Click 'Create a new Request for Quote'


OTIS
Hello Advanced. You last logged in 6 days ago (28 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
My Transactions
Create a new Request for Quote
Supplier Directory

3. Add in the item details for the first line of your RFQ



Tip! Depending on what you are buying it can be good practice to put in a target price. For example, if you are buying some playground equipment - by putting in a target price you are informing the supplier about your budget and therefore to what scale there offer should be.

4. Click 'Add'

Note: You can add in multiple lines to complete your RFQ.

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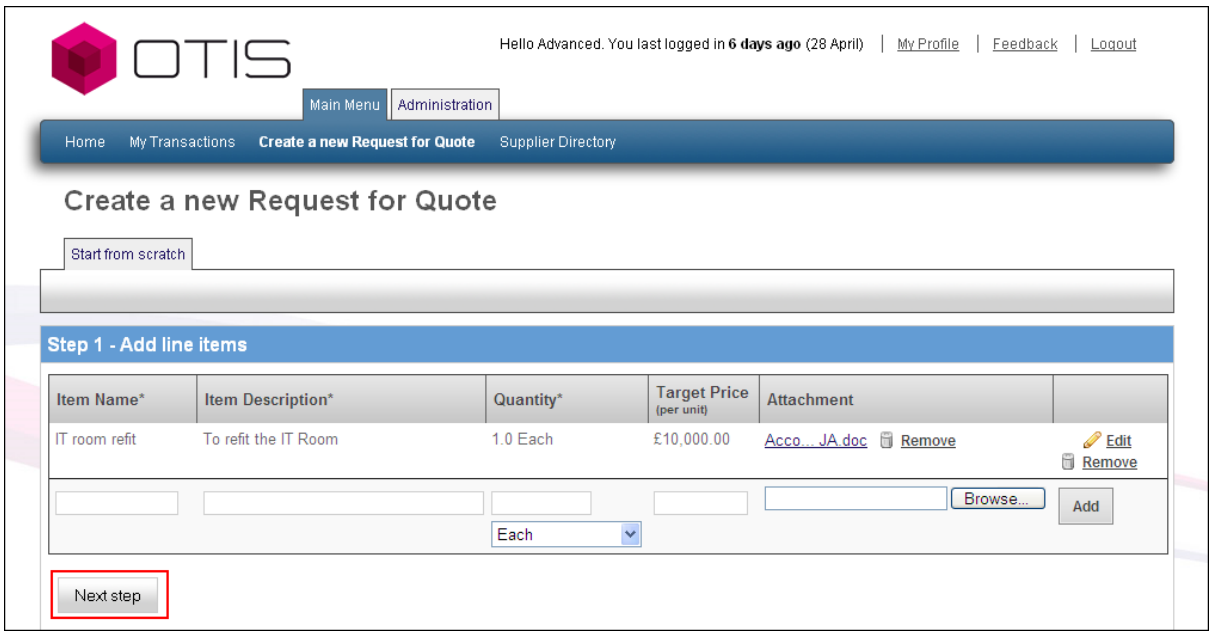
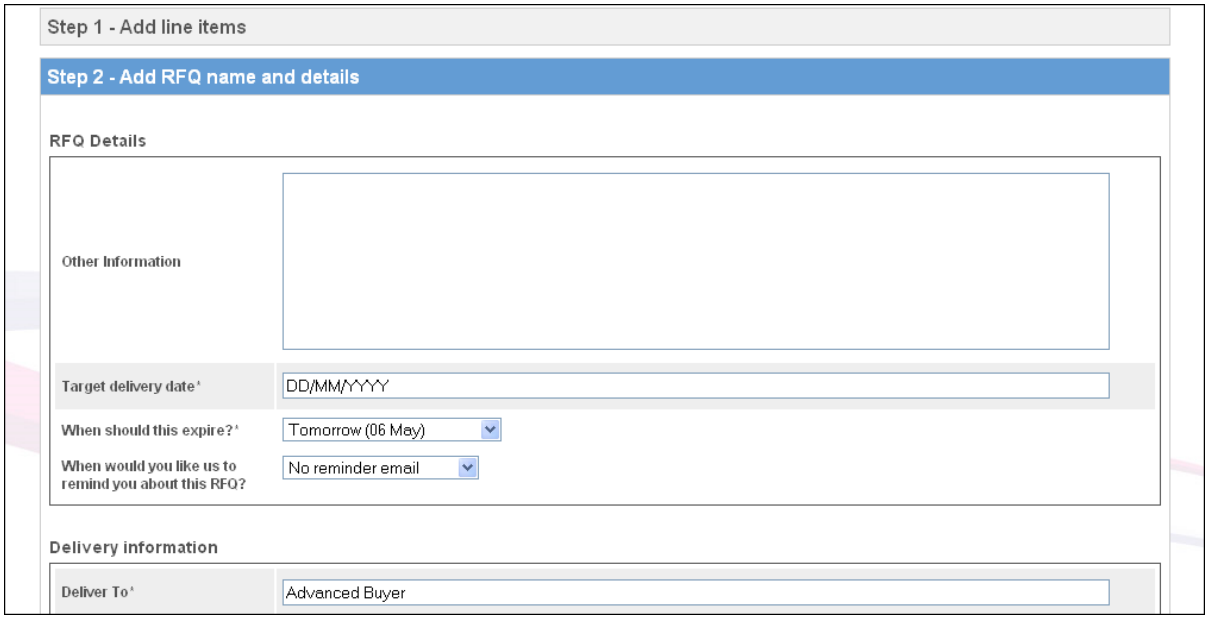
5. When complete click 'Next Step'



6. Add the details of the RFQ such as the expiry and delivery requirements



Note: Select a date from when this should expire field to define when the RFQ expires. This date will be shown within the RFQ sent to the supplier.

Tip! Adding a reminder in an RFQ sends you a reminder via email that the RFQ is coming to an end. You can define how many days before the RFQ closes you would like to receive this email from the drop down.

7. When satisfied with the terms of the RFQ, click 'Next Step'

8. You then need to search and select some suppliers to submit the RFQ too. You can select search for a supplier using the 'Find available suppliers' search engine:

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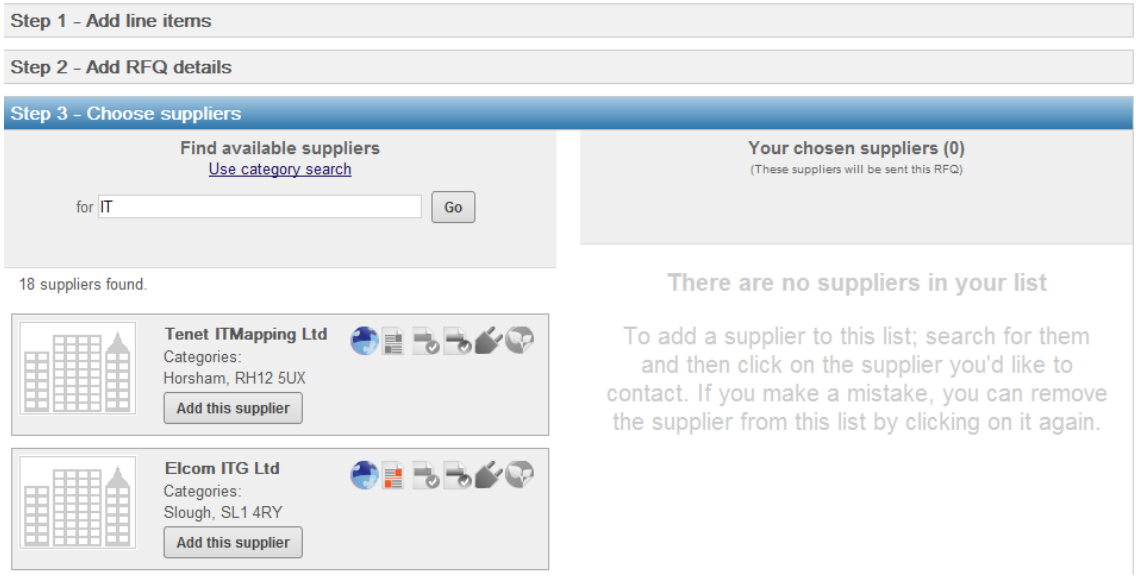
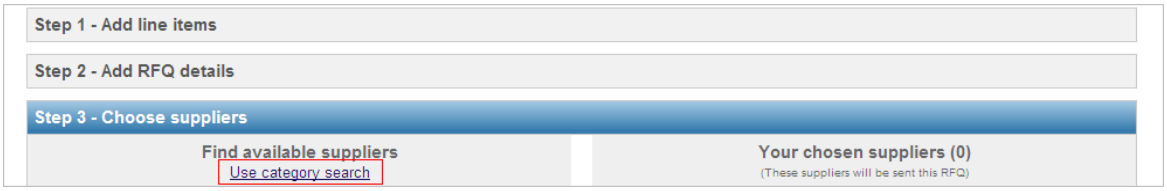
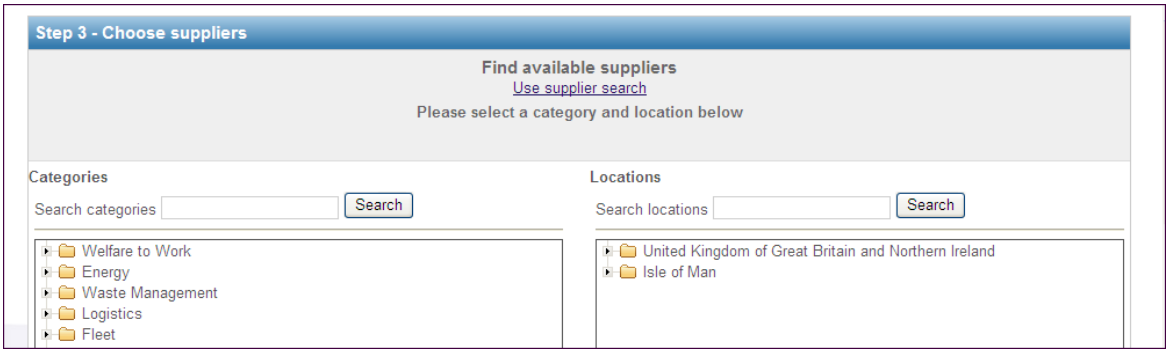

Step 1 - Add line items
Step 2 - Add RFQ details
Step 3 - Choose suppliers
Find available suppliers
Use category search
for IT
Go
18 suppliers found.
Tenet ITMapping Ltd
Categories:
Horsham, RH12 5UX
Add this supplier
Elcom ITG Ltd
Categories:
Slough, SL1 4RY
Add this supplier
Your chosen suppliers (0)
(These suppliers will be sent this RFQ)
There are no suppliers in your list
To add a supplier to this list; search for them and then click on the supplier you'd like to contact. If you make a mistake, you can remove the supplier from this list by clicking on it again.

9. Or you can use the category search to identify suppliers who provide the commodity you are interested in from the regions you require:


Step 1 - Add line items
Step 2 - Add RFQ details
Step 3 - Choose suppliers
Find available suppliers
Use category search
Your chosen suppliers (0)
(These suppliers will be sent this RFQ)

10.From within here you can search for categories and locations or drill through the hierarchy until you reach the desired commodity / location:



11. Once you have found suppliers that meet the your requirements click 'Add all'

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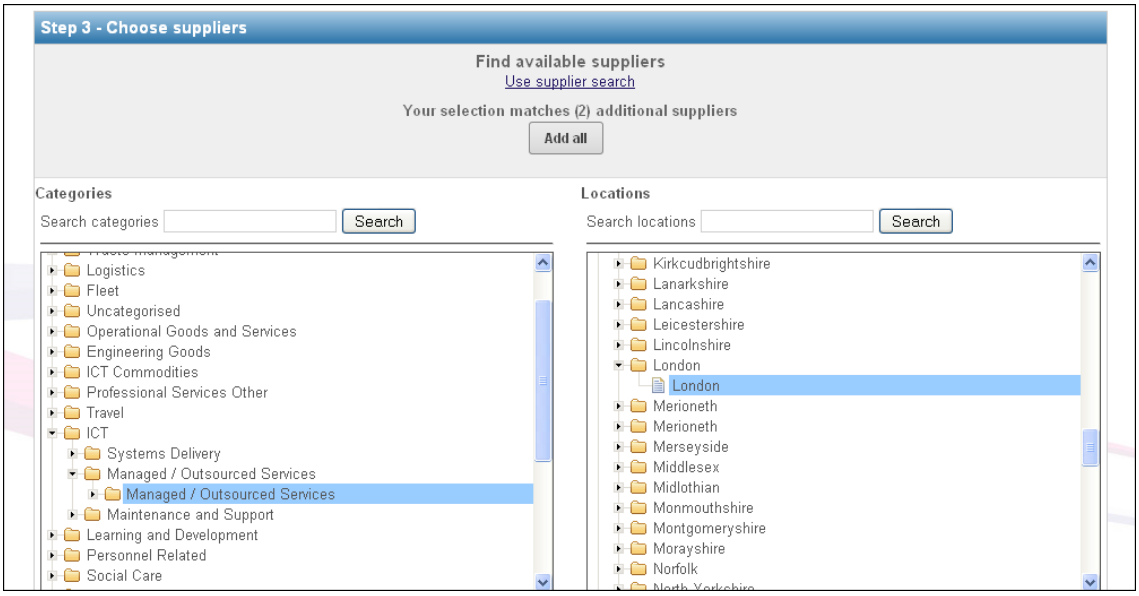
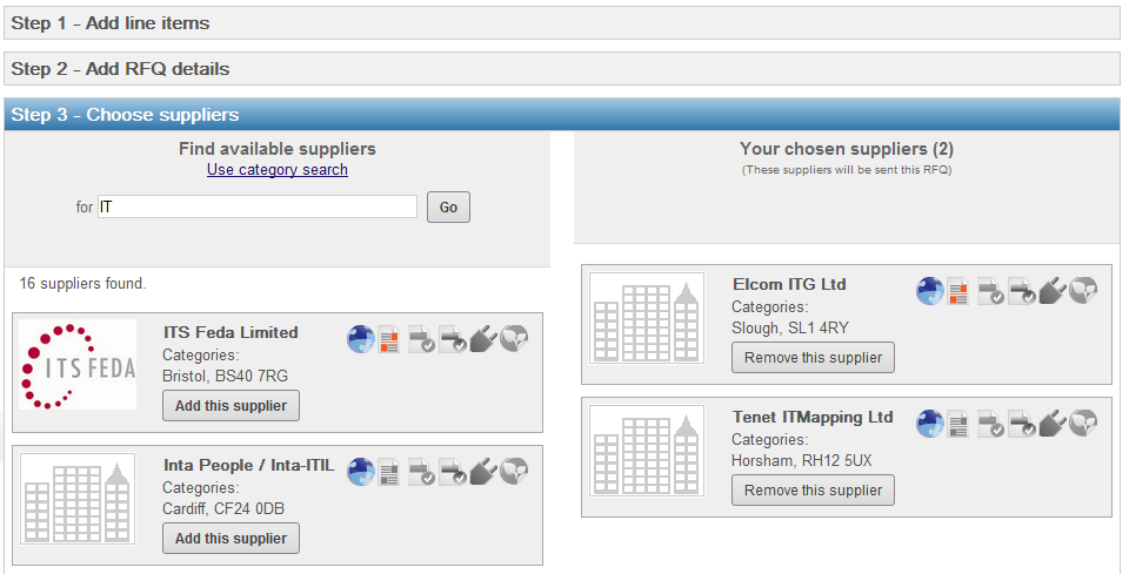
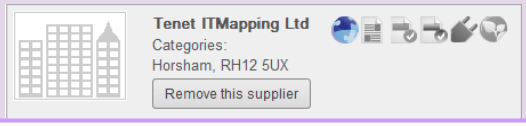


You should be then presented with the suppliers that you have selected in your chosen suppliers list:



Tip! You can remove a supplier from the targeted suppliers list by clicking 'Remove this supplier'



12. Click 'Next step' at the bottom of the page once you have all the suppliers you require to target with your RFQ.

13. You can then confirm the details of the RFQ, edit the content as required, and submit to the suppliers selected.

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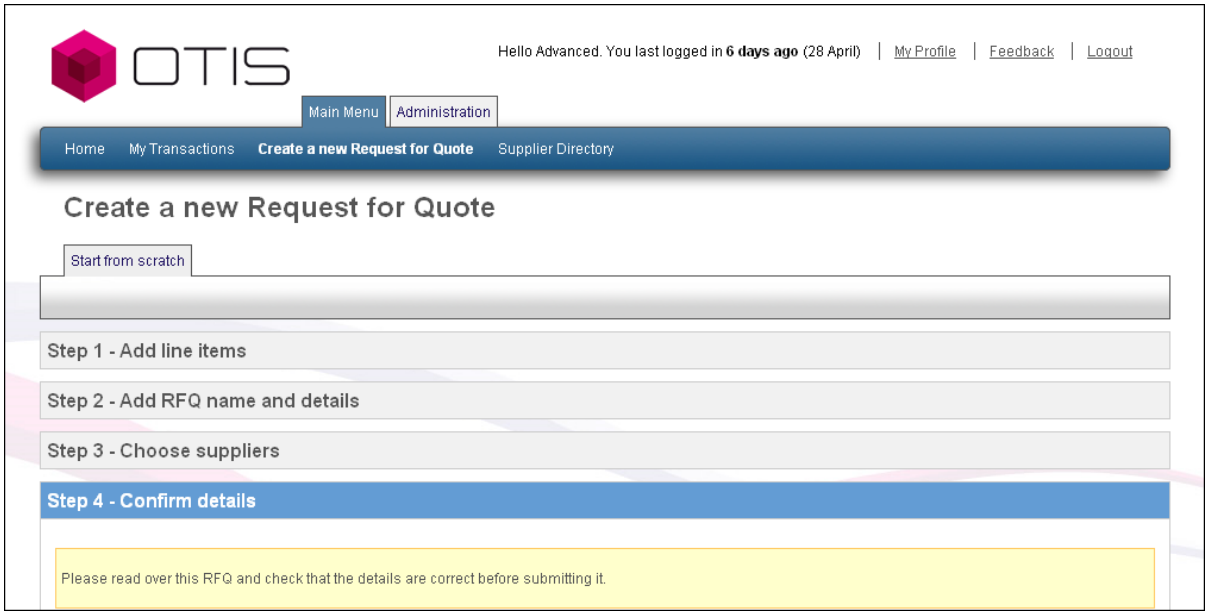
OTIS
Hello Advanced. You last logged in 6 days ago (28 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
My Transactions
Create a new Request for Quote
Supplier Directory
Create a new Request for Quote
Start from scratch
Step 1 - Add line items
Step 2 - Add RFQ name and details
Step 3 - Choose suppliers
Step 4 - Confirm details
Please read over this RFQ and check that the details are correct before submitting it.

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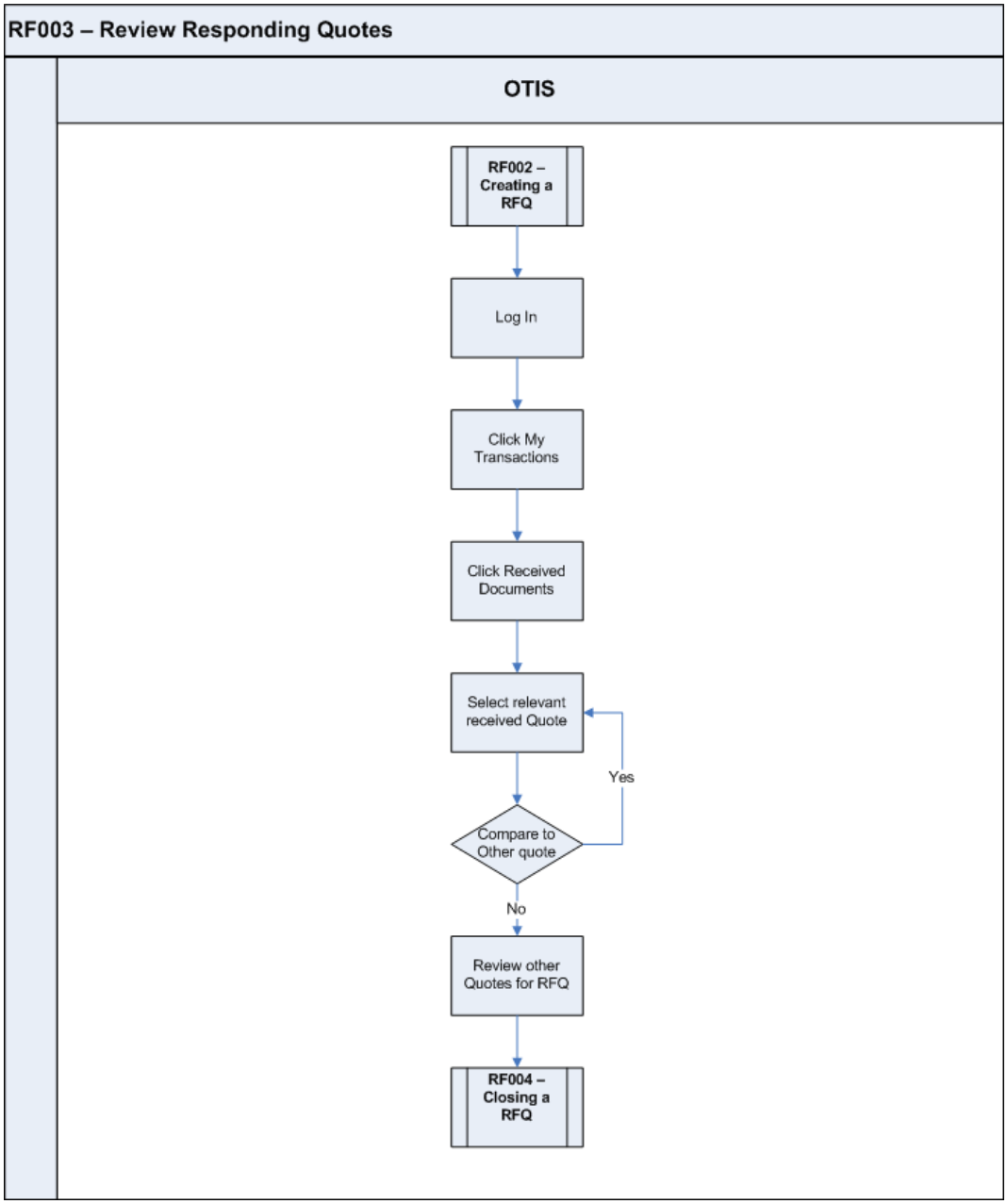
2.2.3.3 Reviewing an RFQ

Overview

This section shows how you review the quotes you have received.



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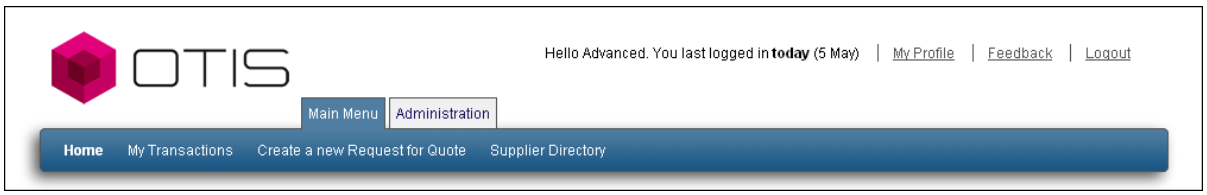
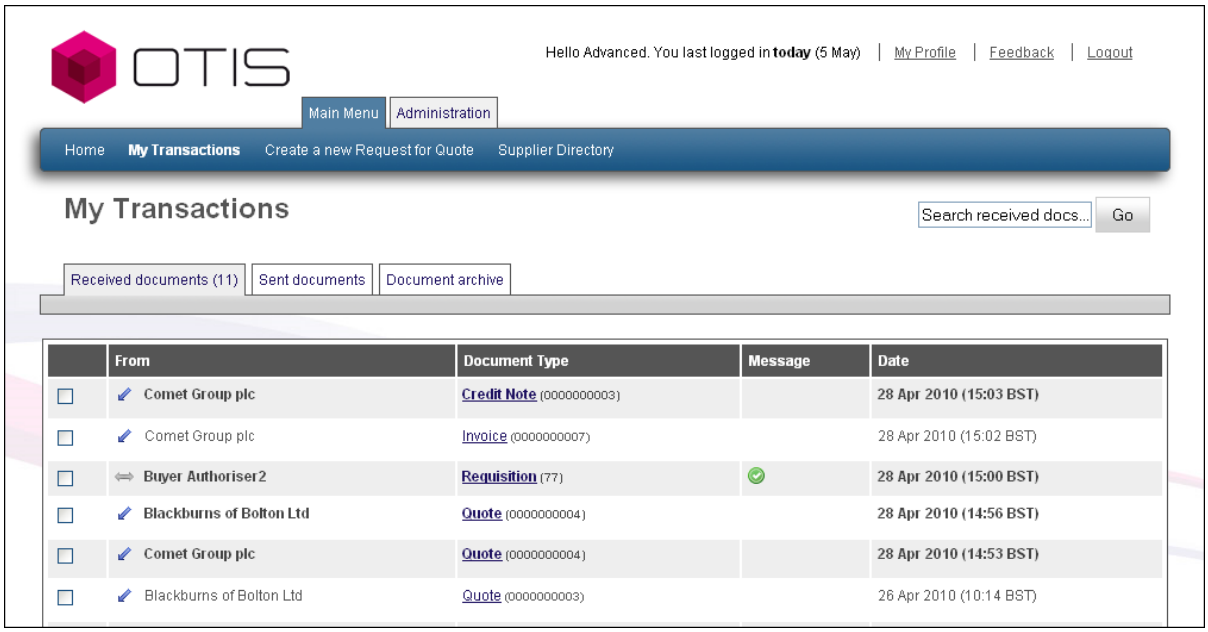
Reviewing received quotes

1. Log in to xchangewales.

2. Navigate to 'My Transactions'

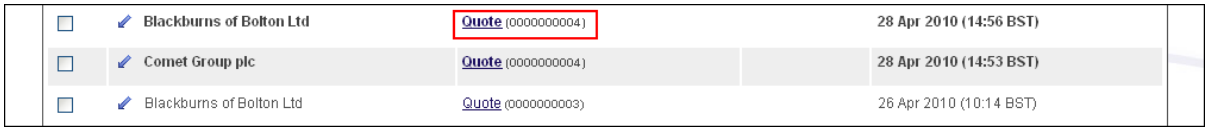


3. Click on the 'Received documents' tab



You should see all the transactions that you have received.

4. Click on a quote you have received



This will show the open quote and show all the other documents in the document tree which you can expand to review.

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Quote number 0000000004
Submition Date 28 Apr 2010 (15:55 BST)
Deliver to Advanced Buyer
Advanced Buyer
Address Line 1
Address Line 2
City
Postcode
United Kingdom
Target delivery date 29 Apr 2010
From Blackburns of Bolton Ltd
Christian Peacock,Unit H, Lecturers Close
Bolton
BL3 6DG
United Kingdom
Item ID | Description | Quantity | Unit Price | Tax rate | Tax amount | Total price
fujitsu camcorder | Fujitsu 12.1MP Camcorder - with LCD Screen | 12 Each | £235.00 | VAT 17.5% | £493.50 | £3,313.50
Totals £493.50 £3,313.50
Other information
Document history
You received Quote 0000000004 from Blackburns of Bolton Ltd on the 28 Apr 2010
Raised on the 28 Apr 2010

Tip! You can also review an RFQ by viewing the original RFQ at looking at the quotes at the footer of the document:

Quote evaluation
Quotes received 2
Average price £6,120.00
Lowest price quotes £1,440.00 - ProcServe Shared Services Limited
£10,800.00 - ProcServe Supplier Solutions Ltd
Reissue this RFQ
Withdraw this RFQ
Forward
Save as PDF
Save as a cXML file
Quotes based on price
Quote 0000000001 - ProcServe Shared Services Limited - Total price £1,440.00
Quote 3 - ProcServe Supplier Solutions Ltd - Total price £10,800.00

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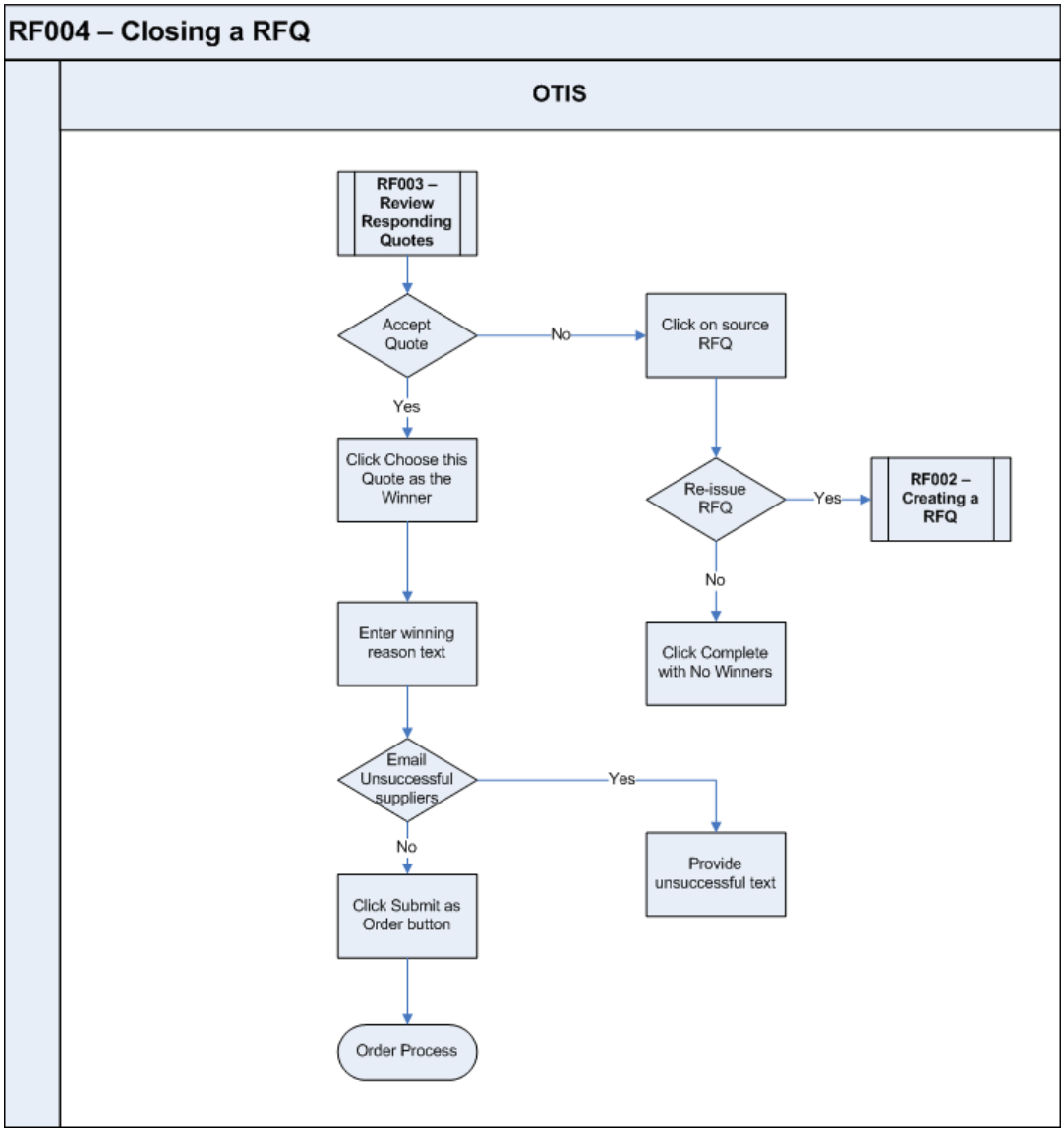
2.2.3.4 Closing an RFQ

Overview

This section shows you how to close an RFQ.



Closing an RFQ

Having reviewed your quotes you can close your RFQ by choosing a winner or closing the RFQ with no winners.

Note: You can withdraw an RFQ before it has closed.

Awarding an RFQ

1. Locate the RFQ within 'My Transactions'

2. Select the winning quote from 'Received documents' in 'My Transactions'

3. Scroll to the bottom of the quote and click 'Choose this quote as the winner'

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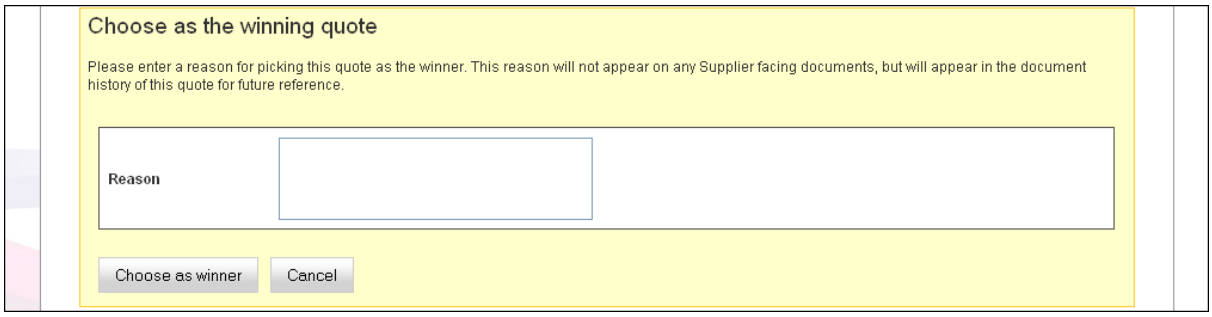
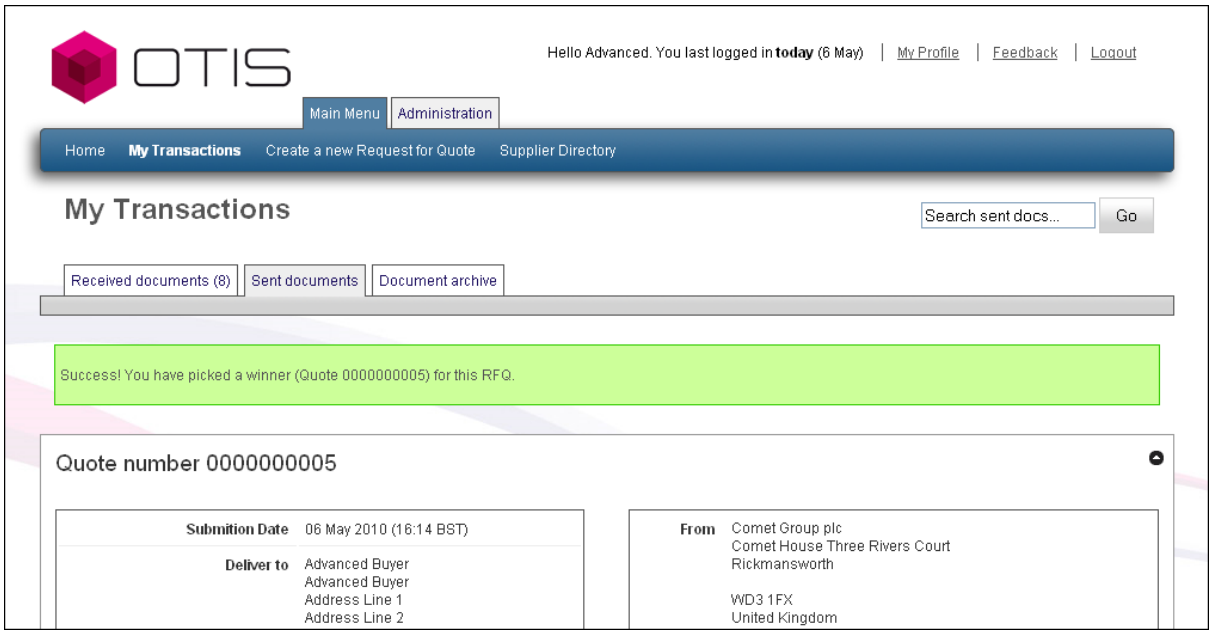
4. Provide a reason and click 'Choose as winner'


Choose as the winning quote
Please enter a reason for picking this quote as the winner. This reason will not appear on any Supplier facing documents, but will appear in the document history of this quote for future reference.
Reason
Choose as winner
Cancel

You will be presented with a success message.



Tip! You can convert your winning quote to an order by clicking 'Submit as order' at the footer of the winning quote.

Closing an RFQ with no winners

1. Locate the RFQ within 'My Transactions'

2. Scroll to the footer of the RFQ and click 'Complete with no winners'

3. Give a reason why you closed the RFQ with no winners and click 'Complete this RFQ'

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Complete with no winner
Please enter a reason for not choosing any of the quotes received against this RFQ. You reason will be recorded for future reference in this RFQs document history.
Reason for withdraw
Complete this RFQ
Cancel

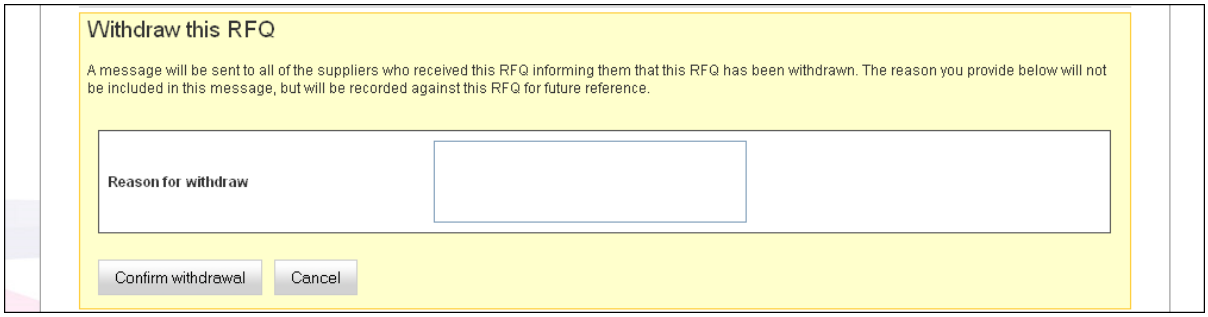
You should be presented with a success message.

Withdrawing an RFQ

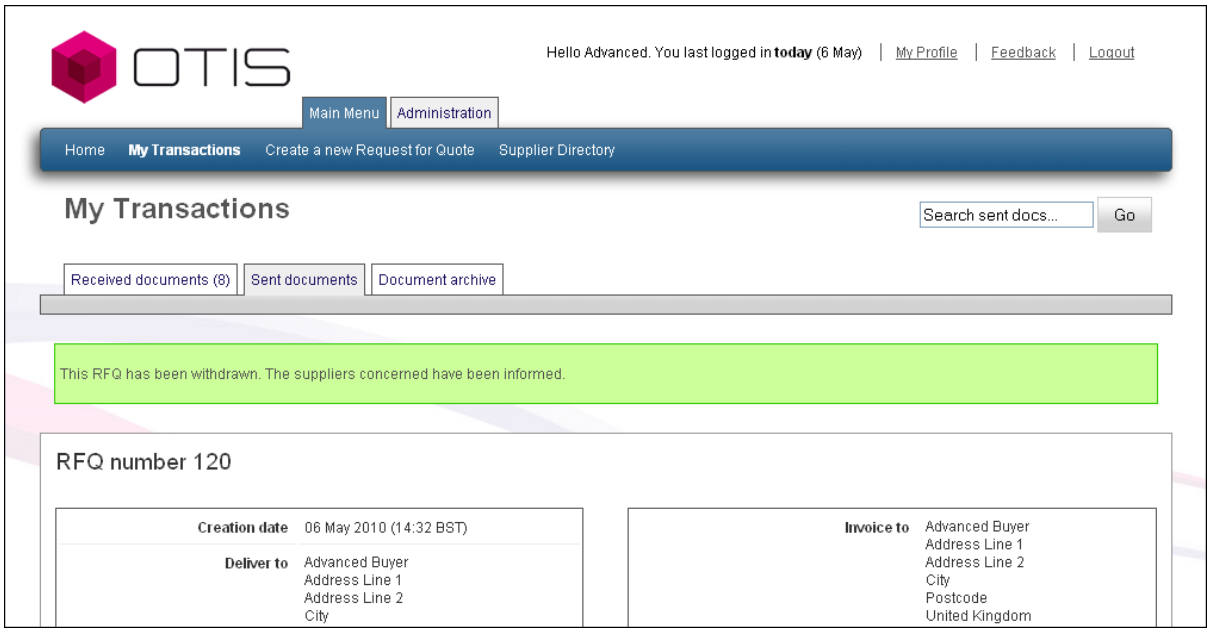
1. Locate the RFQ within 'My Transactions'

2. Scroll to the footer of the RFQ and click 'Withdraw this RFQ'

3. Give a reason why the RFQ is being withdrawn


Withdraw this RFQ
A message will be sent to all of the suppliers who received this RFQ informing them that this RFQ has been withdrawn. The reason you provide below will not be included in this message, but will be recorded against this RFQ for future reference.
Reason for withdraw
Confirm withdrawal
Cancel

You will receive on screen confirmation that the RFQ has been withdrawn and the suppliers will be automatically informed.



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2.2.4 Supplier Directory

2.2.4.1 Introduction to the Supplier Directory

Overview

Supplier Directory allows you to view all suppliers registered on the ProcServe Trading Network who are available in your marketplace.

Note: If you can not see 'Supplier Directory' you may not have the required role. Please check with your system administrator.

Supplier Capabilities

There are up to seven Supplier Capability icons associated with each supplier depending upon the suppliers current status.

These capabilities reflect the supplier registration status, their system integration capabilities, multi-buyer status and environmental certification.

The seven Supplier Capability icons are as follows:

Supplier has been pre-registered but have yet to complete the registration process. They are able to receive PO via email but do not have access to the ProcServe Commerce Network.

Supplier has completed registration and has full access to the ProcServe Commerce Network.

A supplier that currently delivers one or more catalogues to one or more buyers.

A supplier that has submitted at least one quote to an RFQ.

A supplier that has submitted one or more electronic invoices to one or more buyers.

A supplier who is back-end integrated using the ProcServe Commerce Network.

Environmentally Certified.

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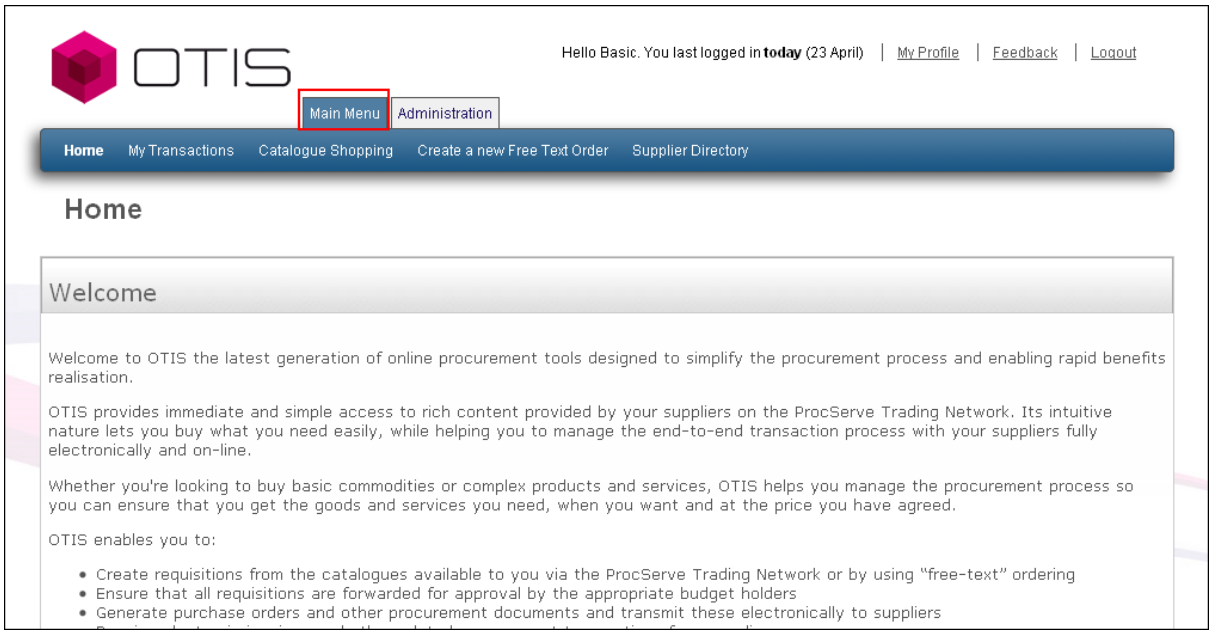
2.2.4.2 Viewing Suppliers my Organisation has traded with

Overview

'Suppliers my Organisation has traded with' shows all the organisations that you have sent an order or a Request for Quote to or have received an Invoice, Quote or Credit Note from.

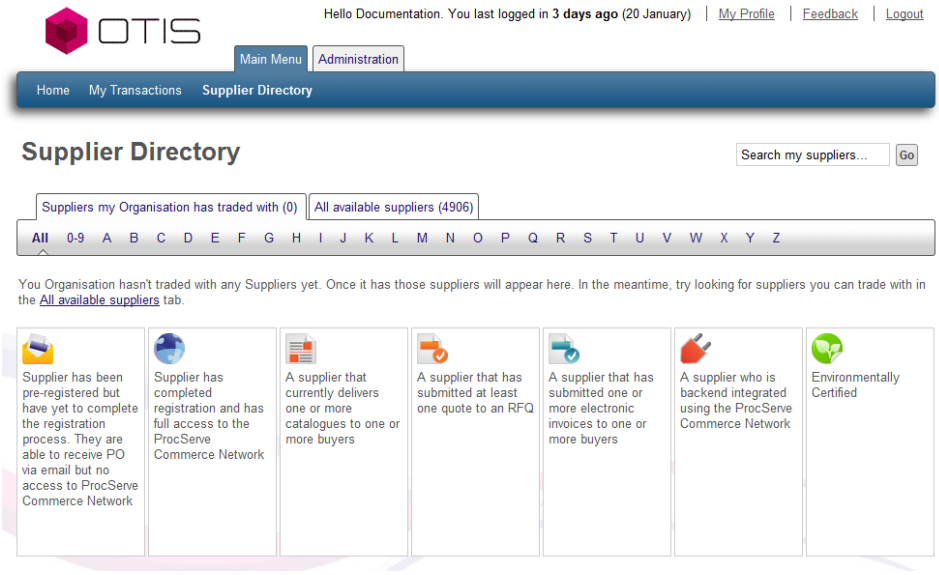
Using 'Supplier my Organisation has traded with'

1. Click on the 'Main Menu' tab within xchangewales


OTIS
Hello Basic. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Create a new Free Text Order
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click on the 'Supplier Directory' tab

From here you can view the suppliers by their name using the alpha numeric list [1] and search for a supplier [2].


OTIS
Hello Documentation. You last logged in 3 days ago (20 January) | My Profile | Feedback | Logout
Main Menu
Administration
Home
My Transactions
Supplier Directory
Supplier Directory
Search my suppliers...
Go
Suppliers my Organisation has traded with (0)
All available suppliers (4906)
All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
You Organisation hasn't traded with any Suppliers yet. Once it has those suppliers will appear here. In the meantime, try looking for suppliers you can trade with in the All available suppliers tab.
Supplier has been pre-registered but have yet to complete the registration process. They are able to receive PO via email but no access to ProcServe Commerce Network
Supplier has completed registration and has full access to the ProcServe Commerce Network
A supplier that currently delivers one or more catalogues to one or more buyers
A supplier that has submitted at least one quote to an RFQ
A supplier that has submitted one or more electronic invoices to one or more buyers
A supplier who is backend integrated using the ProcServe Commerce Network
Environmentally Certified

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2.2.4.3 Viewing All Available Suppliers in the Community

Overview

'All available suppliers' shows all the organisations that are on the ProcServe Trading Network and available in your marketplace.

Using 'All available suppliers'

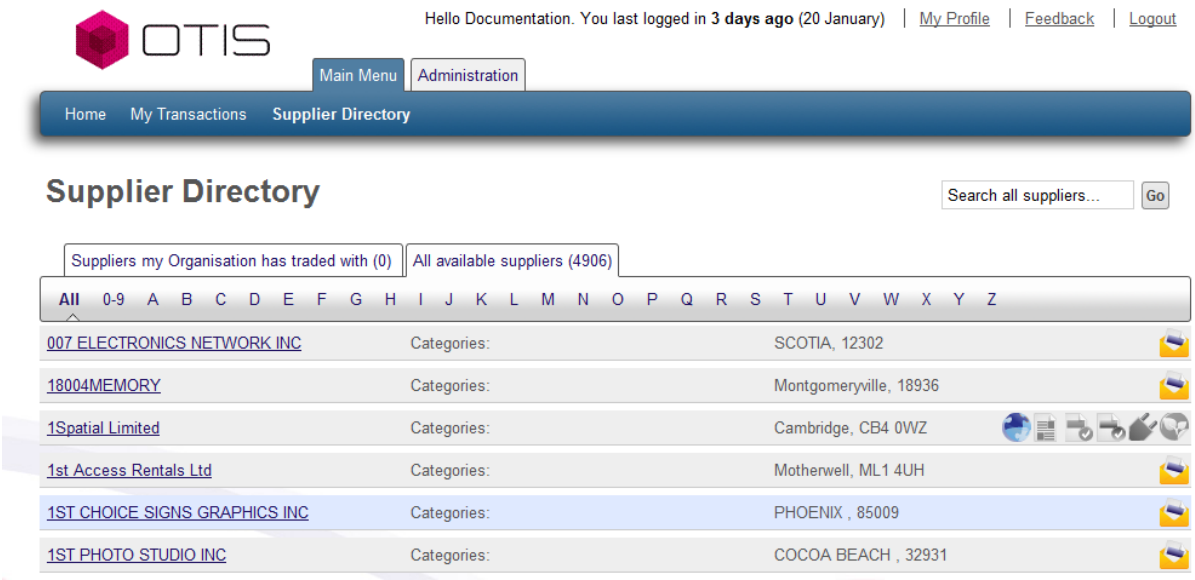
1. Click on the 'Main Menu' tab within xchangewales

2. Click on the 'Supplier Directory' tab

3. Click on the 'All available suppliers' tab

From here you can view the suppliers by their name using the alpha numeric list [1] and search for a supplier [2]

Note: You can search the Supplier Directory by suppliers name, category, DUNS number, contact details or description.


OTIS
Hello Documentation. You last logged in 3 days ago (20 January) | My Profile | Feedback | Logout
Main Menu
Administration
Home
My Transactions
Supplier Directory
Supplier Directory
Search all suppliers...
Go
Suppliers my Organisation has traded with (0)
All available suppliers (4906)
All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
007 ELECTRONICS NETWORK INC Categories: SCOTIA, 12302
18004MEMORY Categories: Montgomeryville, 18936
1Spatial Limited Categories: Cambridge, CB4 0WZ
1st Access Rentals Ltd Categories: Motherwell, ML1 4UH
1ST CHOICE SIGNS GRAPHICS INC Categories: PHOENIX , 85009
1ST PHOTO STUDIO INC Categories: COCOA BEACH , 32931

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2.2.5 Document Tracker

2.2.5.1 Introduction to Document Tracker

Overview

The Document Tracker is an online solution providing an overview of the history and most recent state of transaction documents. Users can see the last status of a transaction with its associated timestamp.
Note: Access to Document Tracker is dependant on your organisation set up and roles (Buyer Reporter)
.

The key areas that the Document Tracker allows Buyers to view details of relating to their documents include:

1. Who the Supplier is
2. The date and time the specified document was:
   a. received by the ProcServe Trading Network
   b. relayed by ProcServe to the Supplier
   c. opened or read by Supplier within the Supplier Portal
   d. a document was downloaded or uploaded by the Supplier using SWS or SPConnect
3. If an invoice has been sent against the purchase order and its associated date
4. A visual representation of the document onscreen
5. A full timestamp audit trail of the document through the ProcServe Trading Network
6. The last status of the document e.g. relayed to a Supplier or an invoice has been received

The Document Tracker also offers the ability to set filters to refine your searching and both show these results onscreen or download them in a Microsoft Excel. The searchable fields currently available include:

1. Document ID
2. Supplier Name
3. Date From and To
4. Document Type
5. Event Type

Any combination of these filters details can be selected to enhance and restrict the search results.

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2.2.5.2 Using Document Tracker

To view the Document Tracker

1. From 'Main Menu' click on 'My Transactions'

2. Click on 'Document Tracking'

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Searching for Documents

The Document Tracker has many different filters and once set, by using the Search/Preview button, will display the results onscreen. Alternatively they may also be downloaded into a Microsoft Excel file by selecting the Excel Spreadsheet button once you have set your filters and the results have been returned. The searchable fields currently available include:

Label	Description
Document ID (text entry)	Enter your purchase order, invoice or credit note reference into this box to return a specific document
Supplier Name (text entry)	Enter the name of the Supplier as registered on the ProcServe Trading Network
Date From and To (select box)	By entering a From date all documents form that date onwards will be returned. By enter a To date all document prior to the specified date will be returned. By selecting both then documents within the date range specified will be returned
Type (drop down list)	Choose from either PO, Invoice or Credit Notes
Event (drop down list)	Events can be used to specify statuses of documents, further details of which are outlined below

1. You can search for documents using any of the search fields highlighted:

2. Once you have added your search term click 'Search / Preview'

Applying an Event Type filter to your documents

The Document Tracker has **Event** types that can be set to view the last event of the documents based on the set filters. These Events are as follows:

Event Filters	Event Filter Details
Received by ProcServe	Shows all documents
Not Viewed or Downloaded	Shows all orders not viewed by the Supplier in the Portal or downloaded by either SWS or SP Connect
Viewed/Downloaded	Shows all orders viewed by a Supplier or downloaded by either SWS or SP Connect
No corresponding documents	Shows all purchase orders that have not been invoiced
Has corresponding documents	Shows all purchase orders that have been invoiced
Error occurred	Shows all documents that are currently being investigated due to processing issues

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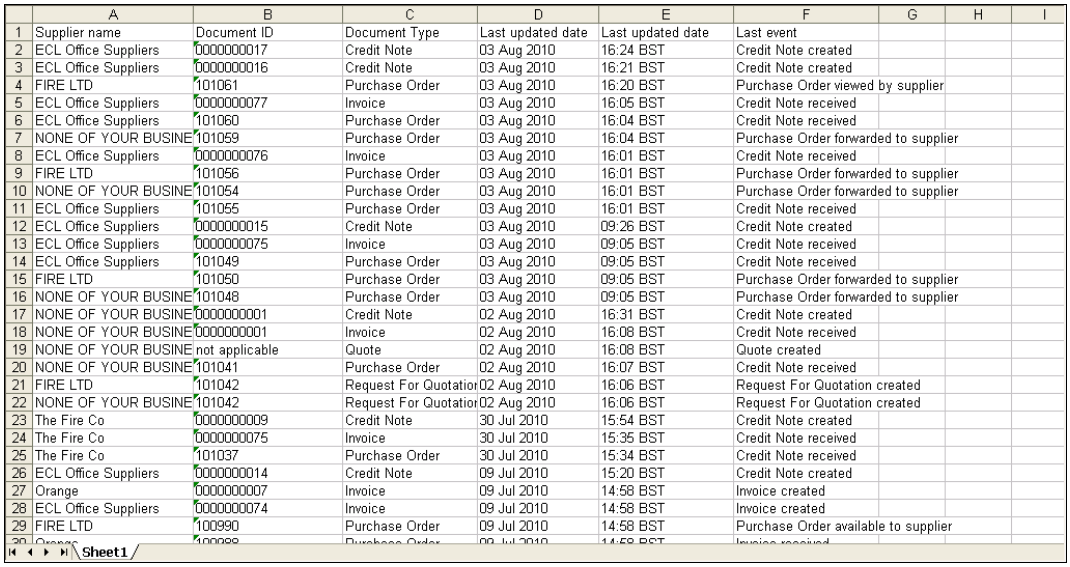
2.2.5.3 Downloading the transactions to Excel

Overview

You can download transactions in Document Tracking to Excel for ease of viewing and data manipulation.

Below is an example of the headings and type of data you can report on:



	A	B	C	D	E	F	G	H	I
1	Supplier name	Document ID	Document Type	Last updated date	Last updated date	Last event			
2	ECL Office Suppliers	0000000017	Credit Note	03 Aug 2010	16:24 BST	Credit Note created			
3	ECL Office Suppliers	0000000016	Credit Note	03 Aug 2010	16:21 BST	Credit Note created			
4	FIRE LTD	101061	Purchase Order	03 Aug 2010	16:20 BST	Purchase Order viewed by supplier			
5	ECL Office Suppliers	0000000077	Invoice	03 Aug 2010	16:05 BST	Credit Note received			
6	ECL Office Suppliers	101060	Purchase Order	03 Aug 2010	16:04 BST	Credit Note received			
7	NONE OF YOUR BUSINE	101059	Purchase Order	03 Aug 2010	16:04 BST	Purchase Order forwarded to supplier			
8	ECL Office Suppliers	0000000076	Invoice	03 Aug 2010	16:01 BST	Credit Note received			
9	FIRE LTD	101056	Purchase Order	03 Aug 2010	16:01 BST	Purchase Order forwarded to supplier			
10	NONE OF YOUR BUSINE	101054	Purchase Order	03 Aug 2010	16:01 BST	Purchase Order forwarded to supplier			
11	ECL Office Suppliers	101055	Purchase Order	03 Aug 2010	16:01 BST	Credit Note received			
12	ECL Office Suppliers	0000000015	Credit Note	03 Aug 2010	09:26 BST	Credit Note created			
13	ECL Office Suppliers	0000000075	Invoice	03 Aug 2010	09:05 BST	Credit Note received			
14	ECL Office Suppliers	101049	Purchase Order	03 Aug 2010	09:05 BST	Credit Note received			
15	FIRE LTD	101050	Purchase Order	03 Aug 2010	09:05 BST	Purchase Order forwarded to supplier			
16	NONE OF YOUR BUSINE	101048	Purchase Order	03 Aug 2010	09:05 BST	Purchase Order forwarded to supplier			
17	NONE OF YOUR BUSINE	0000000001	Credit Note	02 Aug 2010	16:31 BST	Credit Note created			
18	NONE OF YOUR BUSINE	0000000001	Invoice	02 Aug 2010	16:08 BST	Credit Note received			
19	NONE OF YOUR BUSINE	not applicable	Quote	02 Aug 2010	16:08 BST	Quote created			
20	NONE OF YOUR BUSINE	101041	Purchase Order	02 Aug 2010	16:07 BST	Credit Note received			
21	FIRE LTD	101042	Request For Quotatior	02 Aug 2010	16:06 BST	Request For Quotation created			
22	NONE OF YOUR BUSINE	101042	Request For Quotatior	02 Aug 2010	16:06 BST	Request For Quotation created			
23	The Fire Co	0000000009	Credit Note	30 Jul 2010	15:54 BST	Credit Note created			
24	The Fire Co	0000000075	Invoice	30 Jul 2010	15:35 BST	Credit Note received			
25	The Fire Co	101037	Purchase Order	30 Jul 2010	15:34 BST	Credit Note received			
26	ECL Office Suppliers	0000000014	Credit Note	09 Jul 2010	15:20 BST	Credit Note created			
27	Orange	0000000007	Invoice	09 Jul 2010	14:58 BST	Invoice created			
28	ECL Office Suppliers	0000000074	Invoice	09 Jul 2010	14:58 BST	Invoice created			
29	FIRE LTD	100990	Purchase Order	09 Jul 2010	14:58 BST	Purchase Order available to supplier			
30	Orange	100988	Purchase Order	09 Jul 2010	14:58 BST	Invoice received			

Sheet1

Downloading records to Excel

1. Filter the documents you to result

2. When satisfied with results to export click 'Excel Spreadsheet'

A new window will open with an option to Open or Save the file.

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2.3 xchangewales Administration

2.3.1 Overview

Administration Menu Options

Note: Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

1] Community Management - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

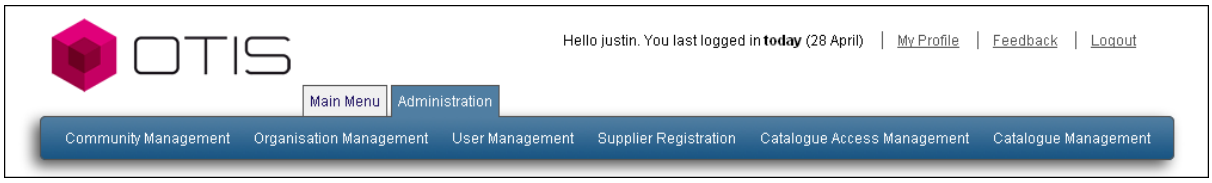
2] Organisation Management - You can view and edit the the general address details of your organisation in 'Organisation Management'.

3] User Management - You can add, edit and deactivate users within your organisation in 'User Management'

4] Supplier Registration - You can manage your supplier adoption in 'Supplier Registration'

5] Catalogue Access Management - You can determine which organisations and users can see what content in 'Catalogue Access Management'

6] Catalogue Management - You can upload and manage your catalogue content in 'Catalogue Management'



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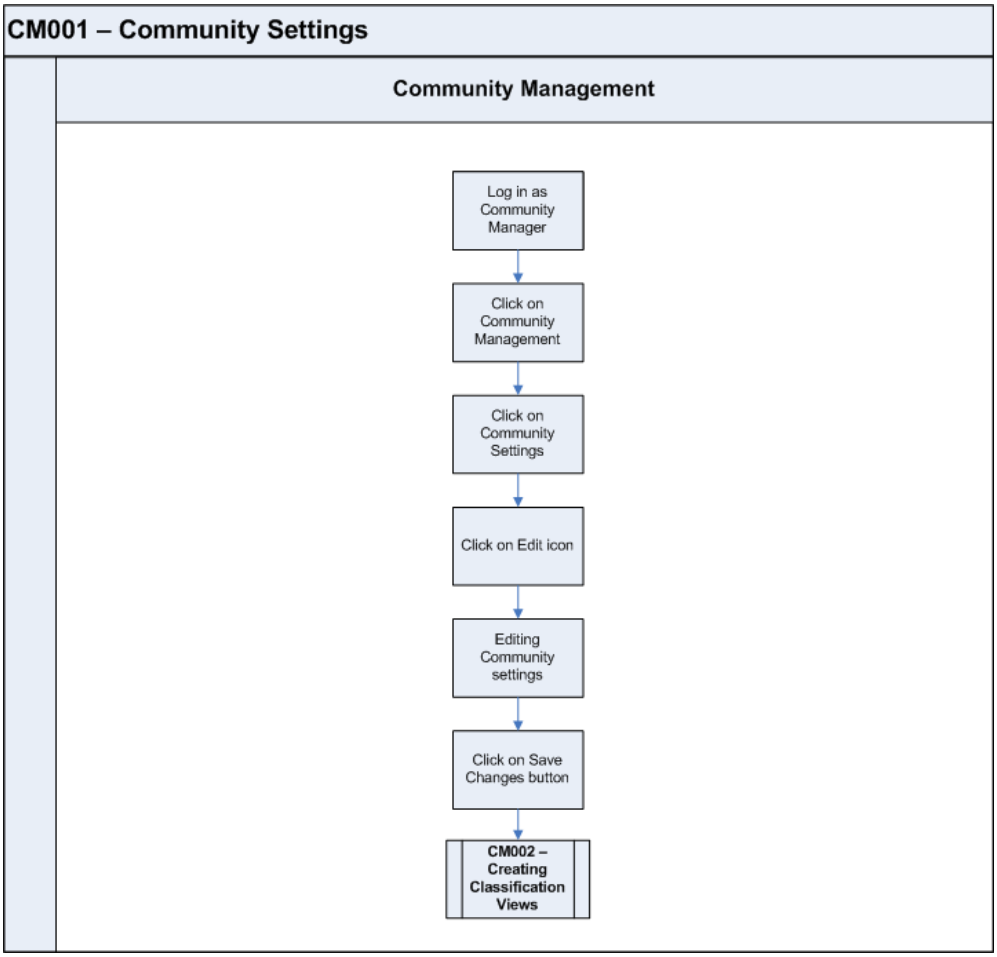
2.3.2 Community Management

2.3.2.1 Community Administration

2.3.2.1.1 Administering Community Helpdesk Details

Overview

Within Community Settings you can change the contact details for the communities helpdesk.


CM001 – Community Settings
Community Management
Log in as Community Manager
Click on Community Management
Click on Community Settings
Click on Edit icon
Editing Community settings
Click on Save Changes button
CM002 – Creating Classification Views

Note: Classification views are managed by the individual buying organisation

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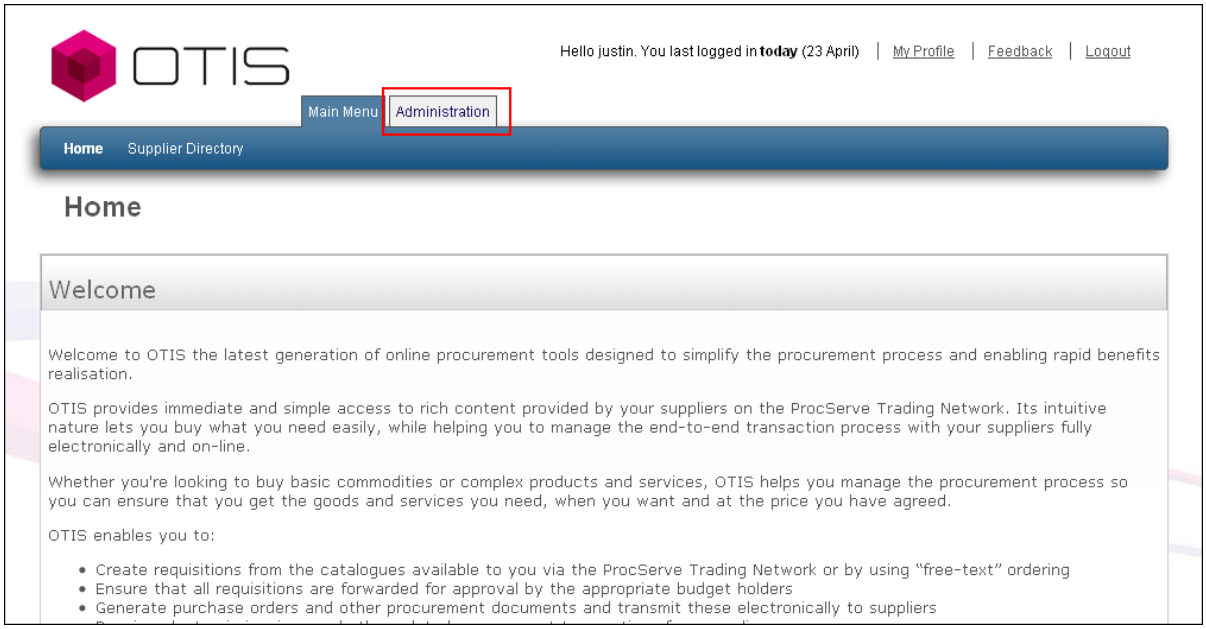
To edit your Community Details

1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
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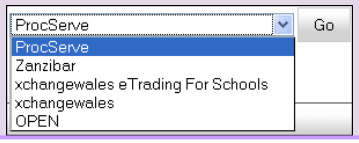
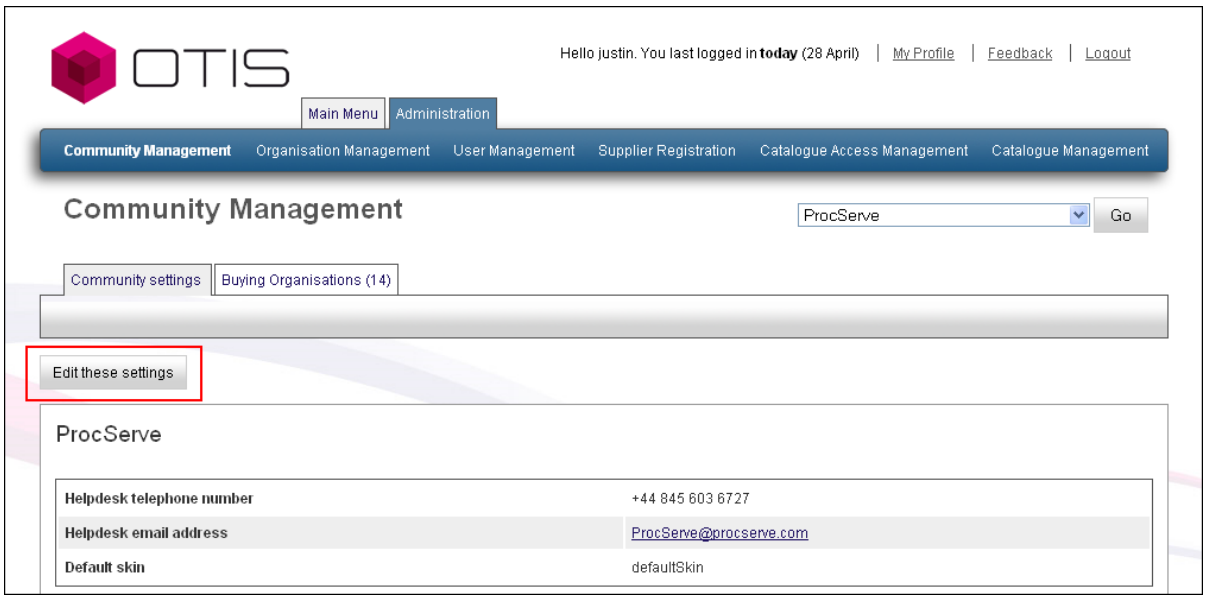
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click on the 'Community Management' tab and then 'Community Settings'

Tip! If you administer multiple communities you can change the drop down to the community you wish to work with.



3. Click on 'Edit these settings'



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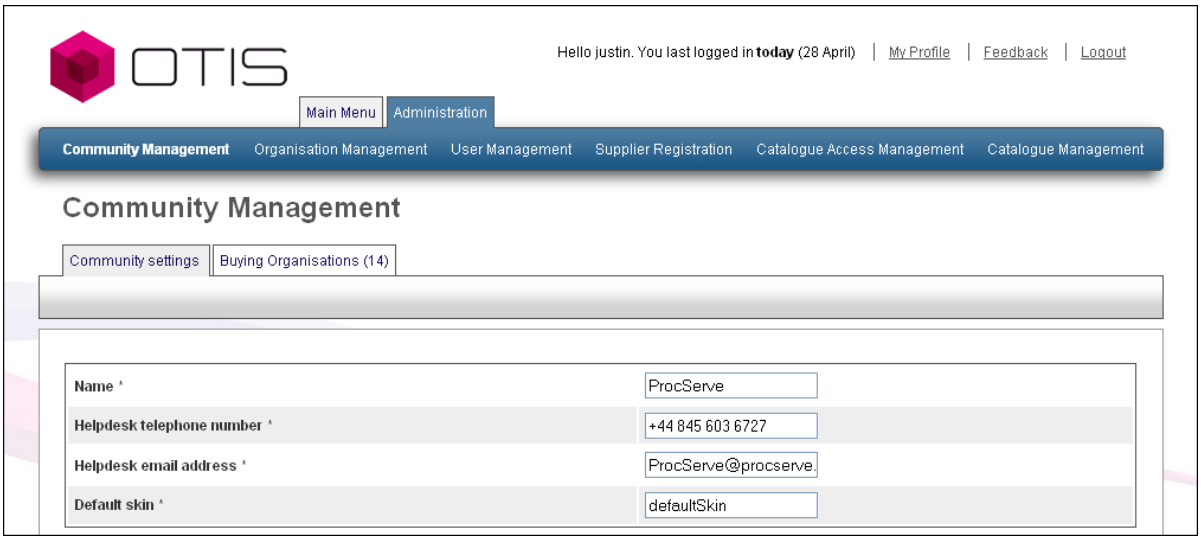
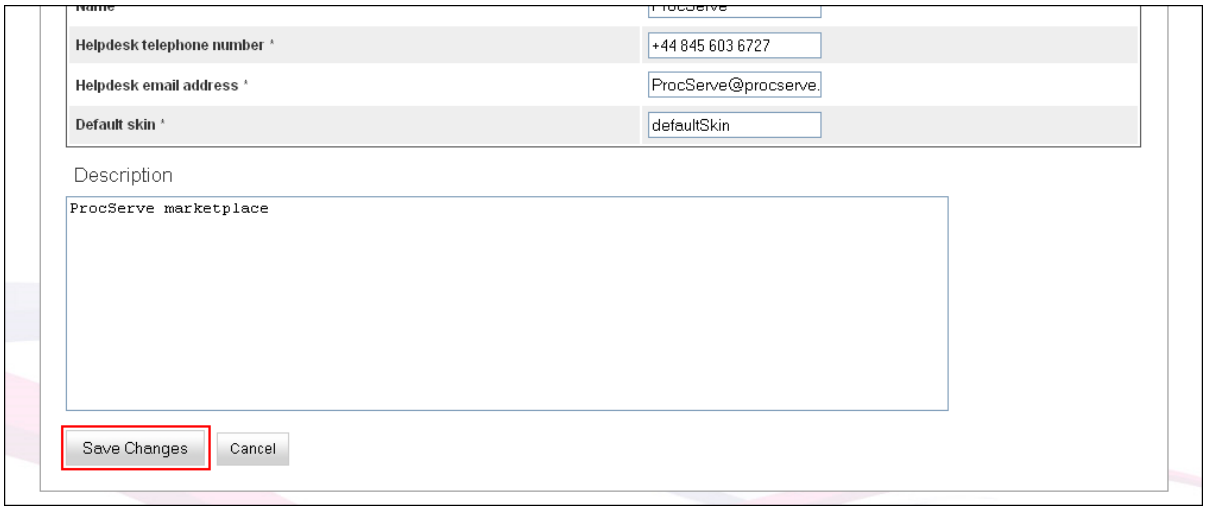
You can now edit the community settings.



Note: You may not be able to edit some of the fields dependant on your Community set up

4. When complete click 'Save changes'



Note: You can cancel any changes by clicking the 'Cancel' button.

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2.3.2.1.2 Community Administration Roles Matrix

When assigning roles to a community administrator, although other roles may be visible, only the following should be used.

Note: All users within the Community Admin organisation should be given the Buyer Contract Manager role.

Role Description	Community Administrator	Community Contract Manager	Buyer Contract Manager
My Transactions	▪	▪	▪
Document Tracker	▪	▪	▪
Supplier Directory	▪	▪	✓
Community Management	✓	▪	▪
** Add new buying org*	✓	▪	▪
** Disable orgs*	✓	▪	▪
** Edit other organisation details*	✓	✓^	✓^
*** Create users in other orgs*	✓	✓^	✓^
*** Edit other orgs Users*	✓	✓^	✓^
Add other orgs to other Comm Admin users	✓	▪	▪
Administer other org Catalogues	✓	✓^	✓^
Organisation Management	✓	▪	▪
User Management	✓	▪	▪
Create new users within org	✓	▪	▪
Edit existing user within org	✓	▪	▪
Amend User Roles within org	✓	▪	▪
Amend own role within org	✓	▪	▪
Supplier Registration	✓	✓	✓
Catalogue Access Management	✓	✓	✓
**** Administer Classification views*	✓	✓	✓
Catalogue Management	✓	✓	✓

* This should only be done by ProcServe Service Desk / support teams.
** This should be done by the buying organisation and not Value Wales.
*** Classification views need to be created and maintained in Catalogue Access Management and not the new Buyer Portal.
^. Only if granted access by Community Administrator to other orgs

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2.3.2.1.3 Buying Organisation Roles Matrix

When assigning roles to a user in a buying organisation, although other roles may be visible, only the following should be used.

Note: Buyer Super User role is no longer used.

Role Description	Buyer Administrator	Buyer Basic	Buyer Reporter
My Transactions	▪	▪	✓
Document Tracker	▪	▪	✓
Supplier Directory	✓	✓	✓
Organisation Management	✓	▪	▪
User Management	✓	▪	▪
Create new users within org	✓	▪	▪
Edit existing user within org	✓	▪	▪
Amend User Roles within org	✓	▪	▪
Amend own role within org	✓	▪	▪
Supplier Registration	✓	▪	▪
Catalogue Access Management	✓	▪	▪
**** Administer Classification views*	✓	▪	▪
Catalogue Management	✓	▪	▪

*** Classification views need to be created and maintained in Catalogue Access Management and not the new Buyer Portal.

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2.3.2.1.4 Editing the Roles a User has in an Organisation

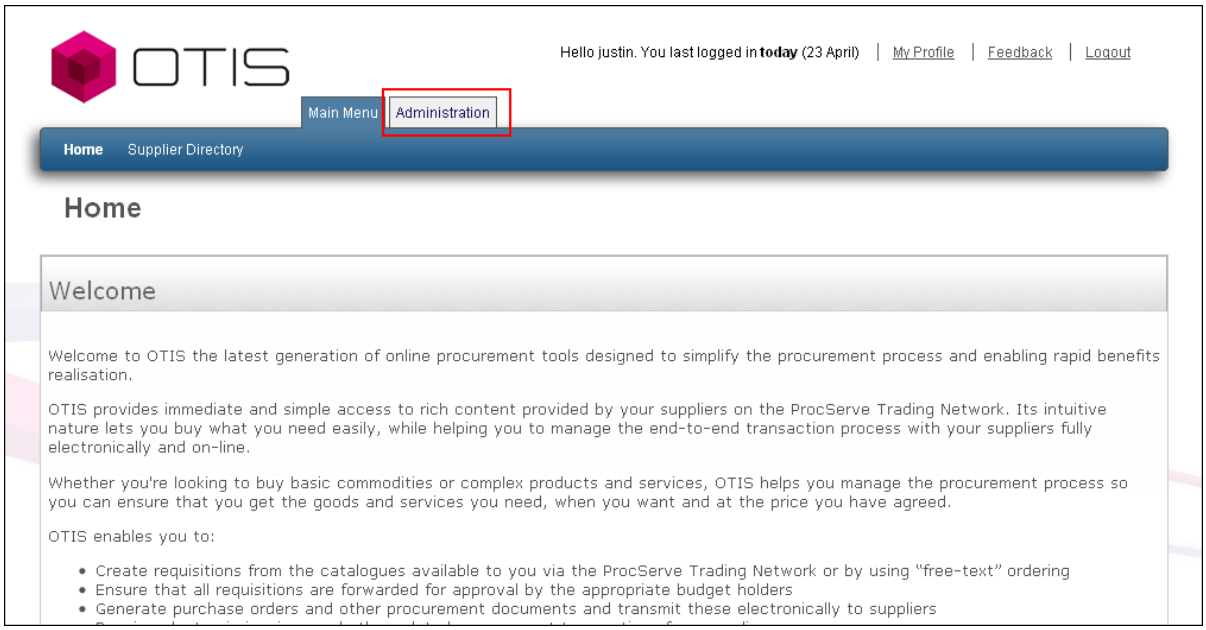
Overview

At any time you can amend a users role they have within an organisation within your community.

Tip: You may wish to do this so you can provide Community support by switching to an organisation with the same roles as the user who has raised the issue to ensure consistency with their view.

To edit the roles of a user

1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
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Supplier Directory
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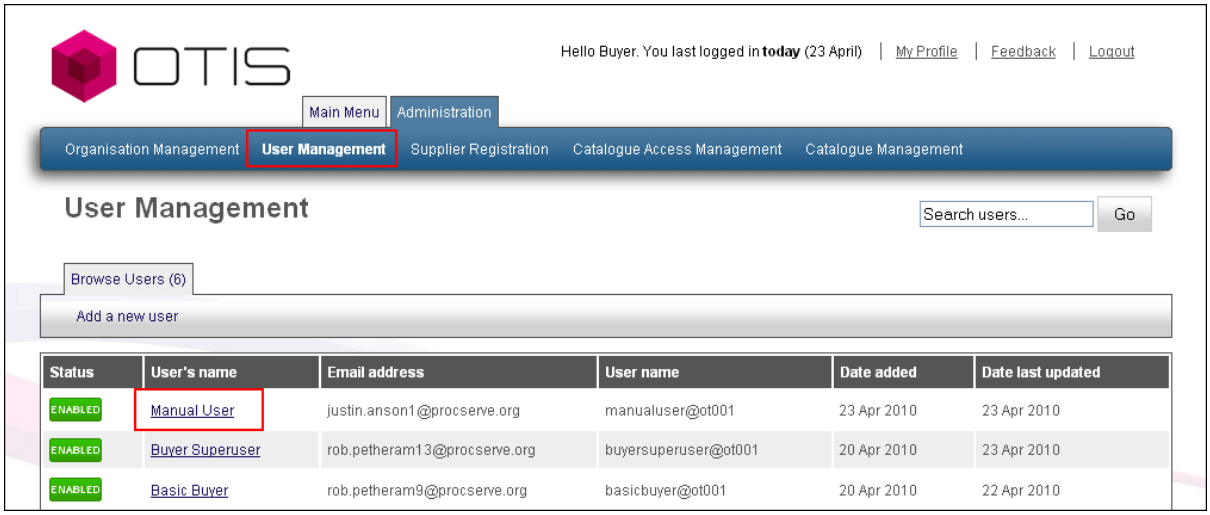
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click on 'User Management' and search for the user you wish to edit

Tip: You can search users in your community by searching for the organisation or the DUNS number in the search term field.

3. Click on the user you wish to edit the roles for



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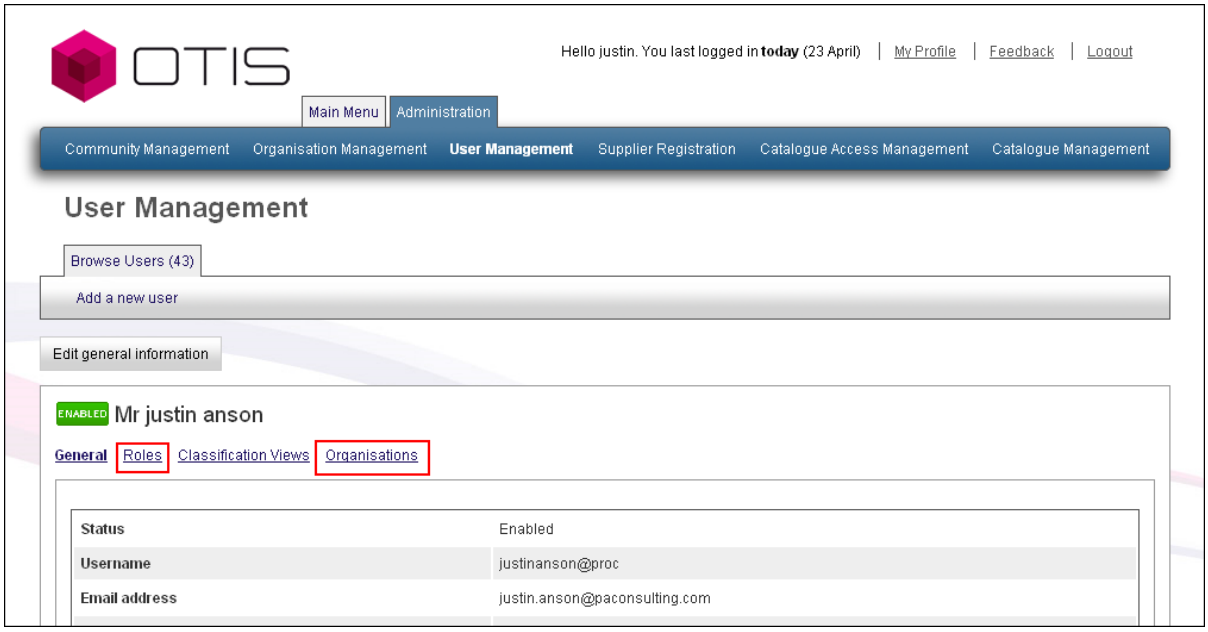
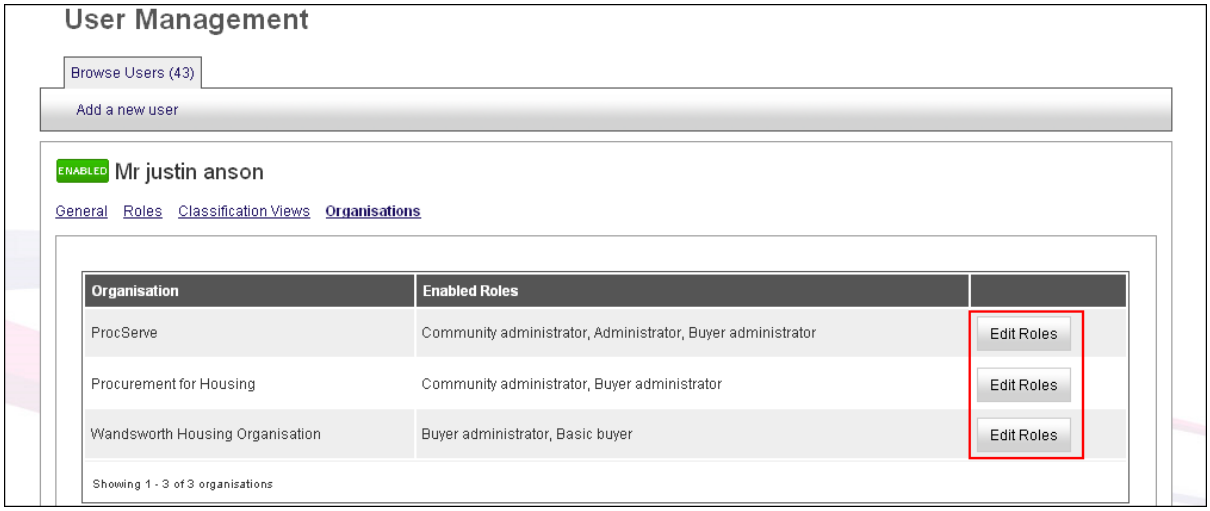
4. Click on the 'Organisation' button to edit their roles in a different organisation other than their parent (go to step 5) OR click on 'Roles' to edit their roles in the parent organisation (go to step 6).



5. Click on the 'Edit Roles' button against the organisation you wish to amend the users roles for



6. Enable and disable roles as required by clicking the 'Enable role' or 'Disable role' button as necessary.You should add the roles of

Buyer Administrator plus Buyer Reporter

or

Basic Buyer plus Buyer Reporter.

Note: There is no need to save any changes but the user will have to re-log in for the changes to take effect.

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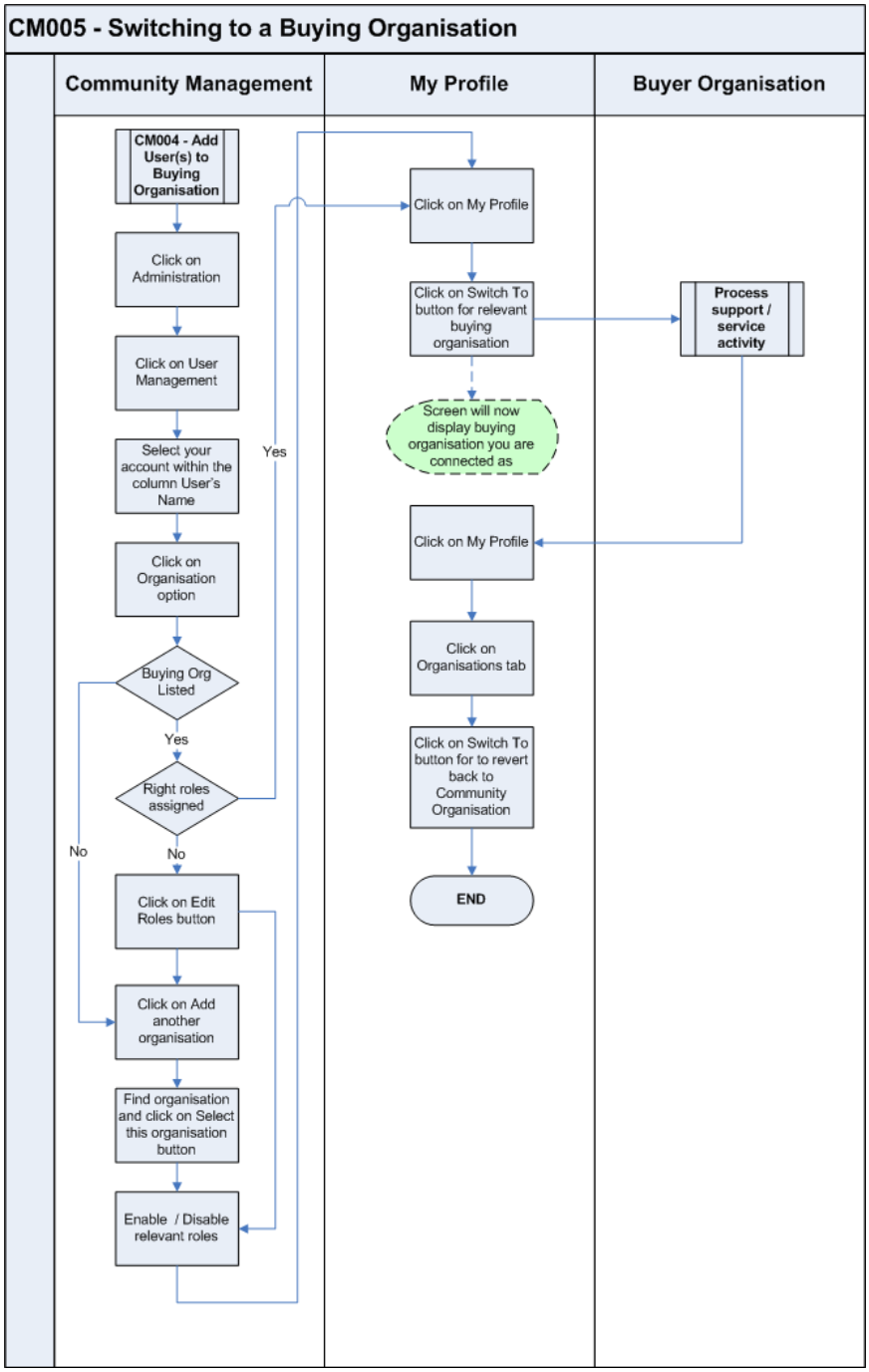
2.3.2.1.5 Sw itching Organisations

Overview

This section highlights how you can switch organisations to work in their organisation and troubleshoot issues.


CM005 - Switching to a Buying Organisation
Community Management
My Profile
Buyer Organisation
CM004 - Add User(s) to Buying Organisation
Click on Administration
Click on User Management
Select your account within the column User's Name
Click on Organisation option
Buying Org Listed
Yes
No
Right roles assigned
Yes
No
Click on Edit Roles button
Click on Add another organisation
Find organisation and click on Select this organisation button
Enable / Disable relevant roles
Click on My Profile
Click on Switch To button for relevant buying organisation
Process support / service activity
Screen will now display buying organisation you are connected as
Click on My Profile
Click on Organisations tab
Click on Switch To button for to revert back to Community Organisation
END

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Switching Organisations

Note: As the above flow chart suggests, there are different steps required to switch organisations depending on your current user configuration. The following instruction will show the full process as if this was the first time you have the requirement to switch to the organisation. This is done in two main steps:

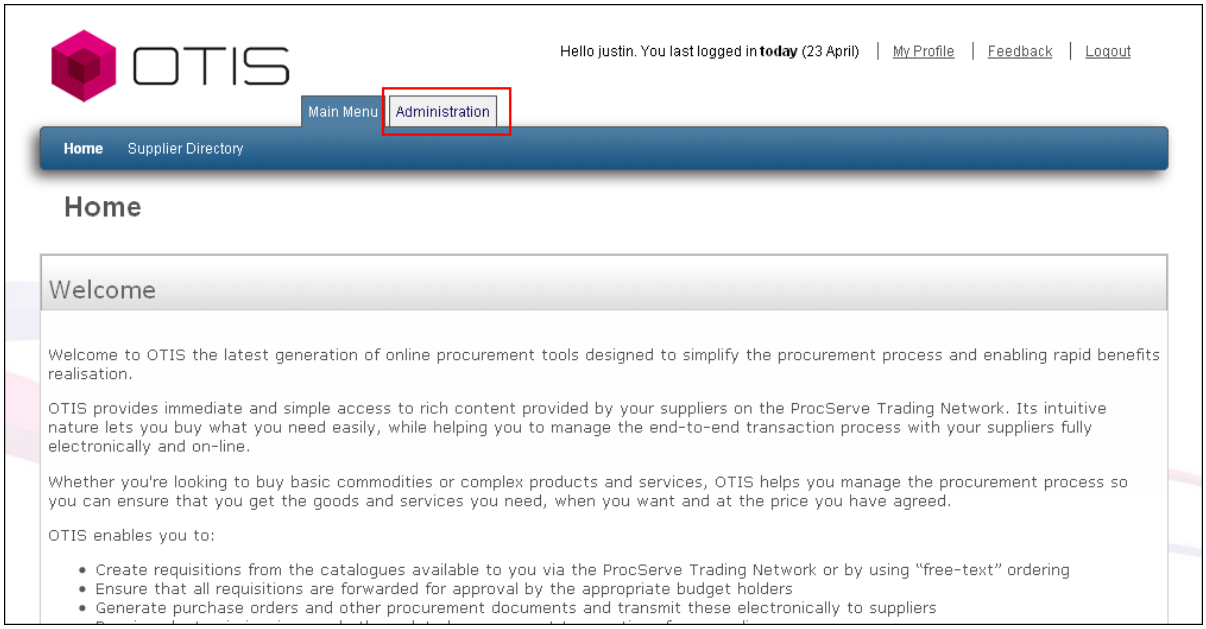
Adding the organisation to your Profile and

Adding Roles that the user will have within this organisation

Adding an organisation to a user profile

1. Log in to xchangewales.

2. Click on 'Administration'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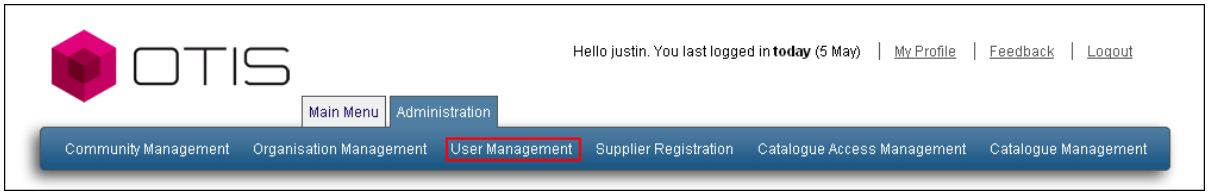
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

3. Click on 'User Management'



4. Search for the user you wish to add the organisation too

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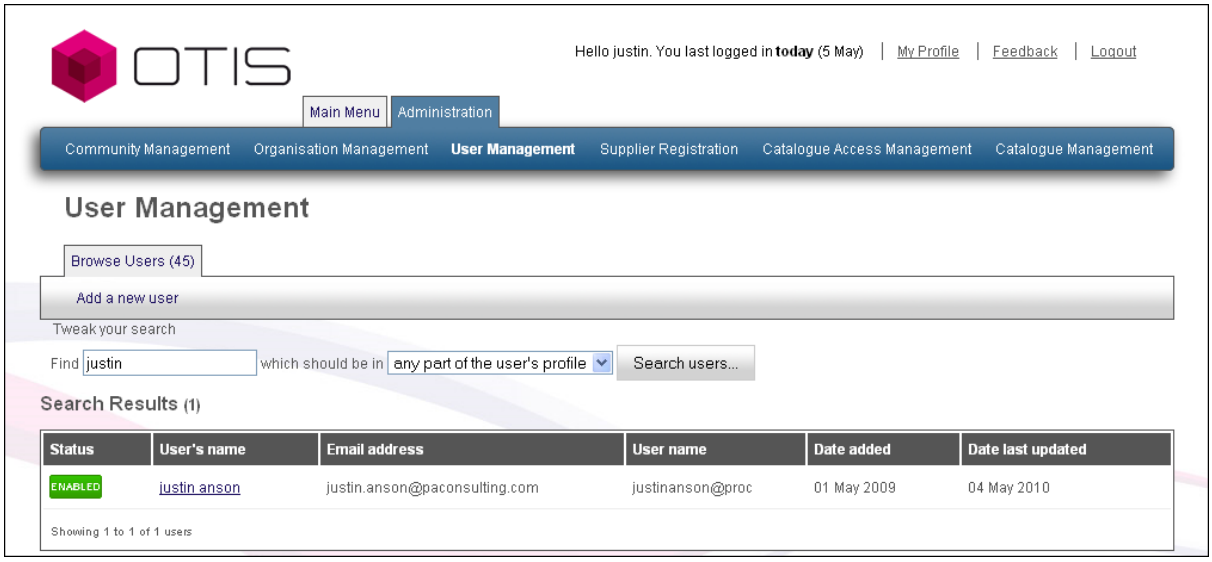
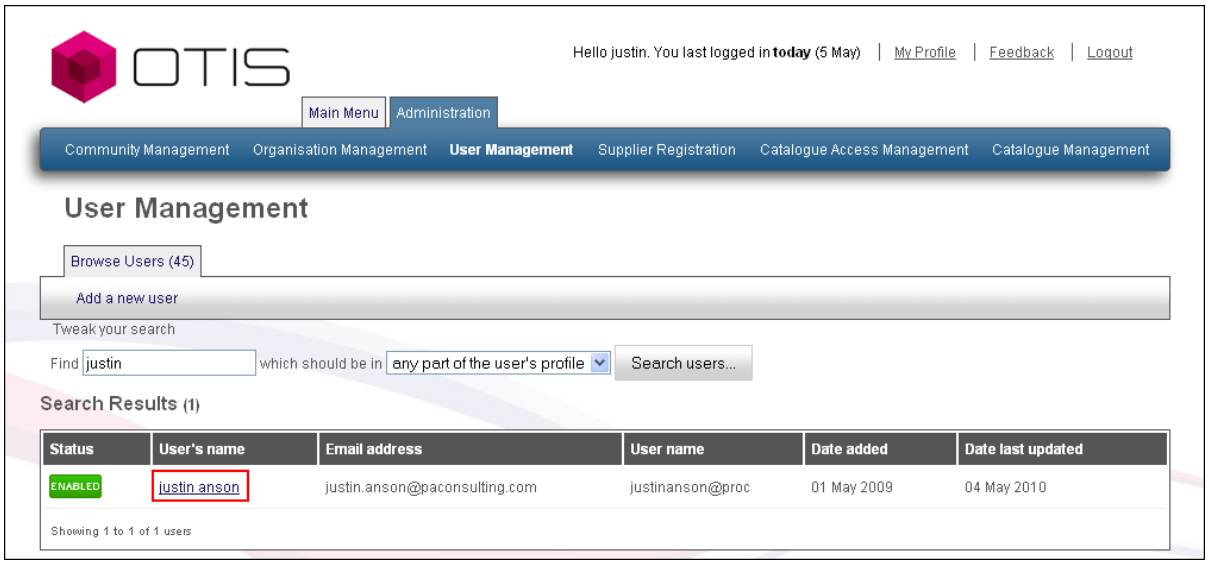


5. Click on the link of the user



6. Click on the 'Organisations' tab

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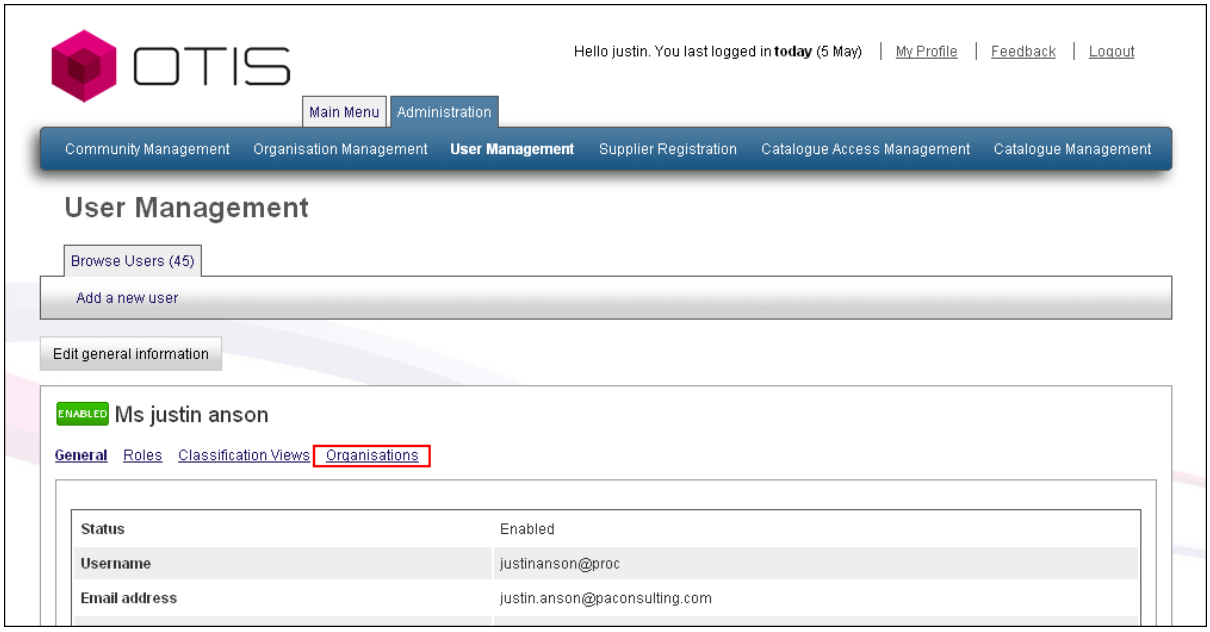
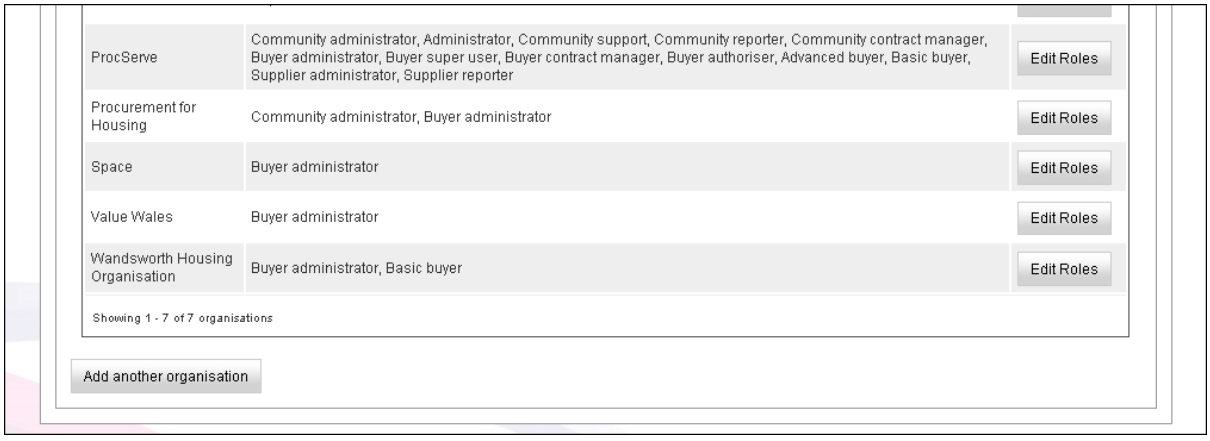


You will see the organisations you already have access too

Tip! You can edit the roles you have in the existing organisations from this screen too.

7. Click on 'Add another organisation' at the footer of the page


ProcServe
Community administrator, Administrator, Community support, Community reporter, Community contract manager, Buyer administrator, Buyer super user, Buyer contract manager, Buyer authoriser, Advanced buyer, Basic buyer, Supplier administrator, Supplier reporter
Edit Roles
Procurement for Housing
Community administrator, Buyer administrator
Edit Roles
Space
Buyer administrator
Edit Roles
Value Wales
Buyer administrator
Edit Roles
Wandsworth Housing Organisation
Buyer administrator, Basic buyer
Edit Roles
Showing 1 - 7 of 7 organisations
Add another organisation

8. Search for the organisation you wish to add the user too

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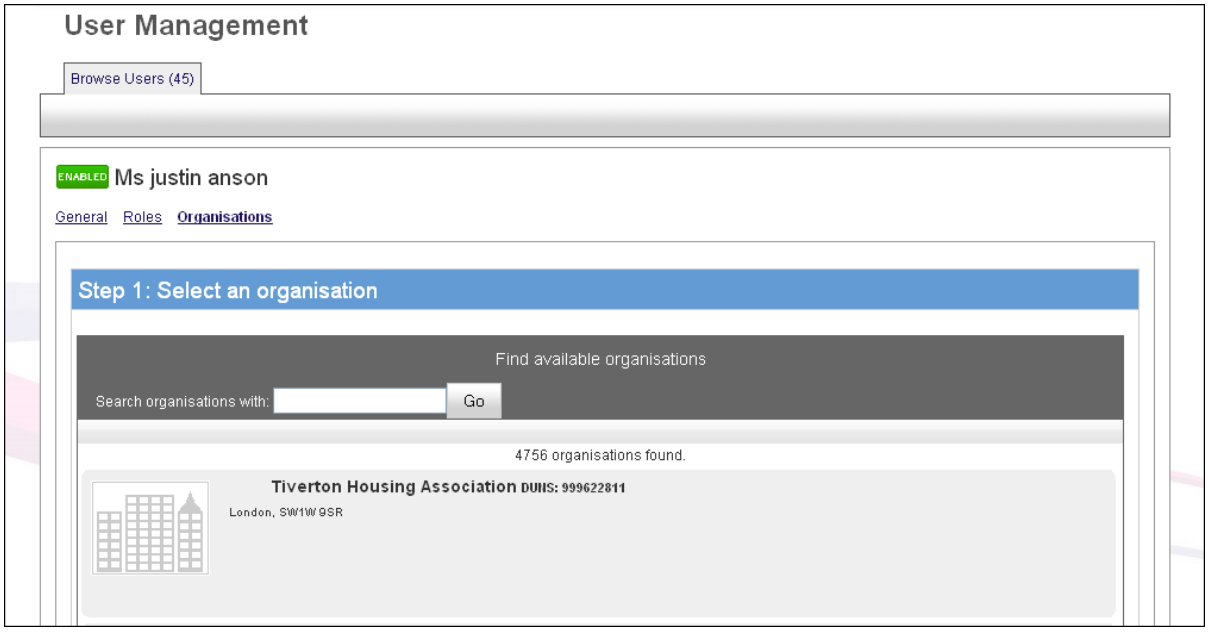


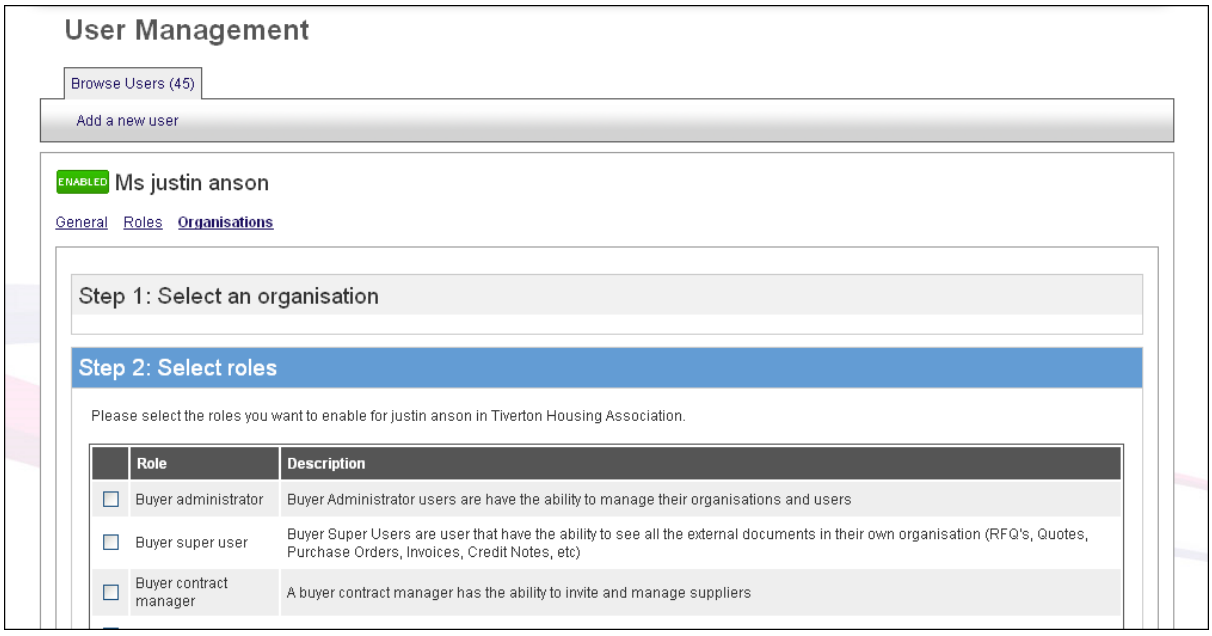
9. Click anywhere on the box of the organisation you wish to add to the user

10. You can then add roles to the user to complete the required tasks within the organisation.

You should add the roles of: Buyer Administrator AND Buyer Reporter

or

Buyer Basic and Buyer Reporter.


User Management
Browse Users (45)
Add a new user
ENABLED Ms justin anson
General Roles Organisations
Step 1: Select an organisation
Step 2: Select roles
Please select the roles you want to enable for justin anson in Tiverton Housing Association.
Role
Description
Buyer administrator
Buyer Administrator users are have the ability to manage their organisations and users
Buyer super user
Buyer Super Users are user that have the ability to see all the external documents in their own organisation (RFQ's, Quotes, Purchase Orders, Invoices, Credit Notes, etc)
Buyer contract manager
A buyer contract manager has the ability to invite and manage suppliers

11. When complete click 'Add these roles'

You will get a success menu.

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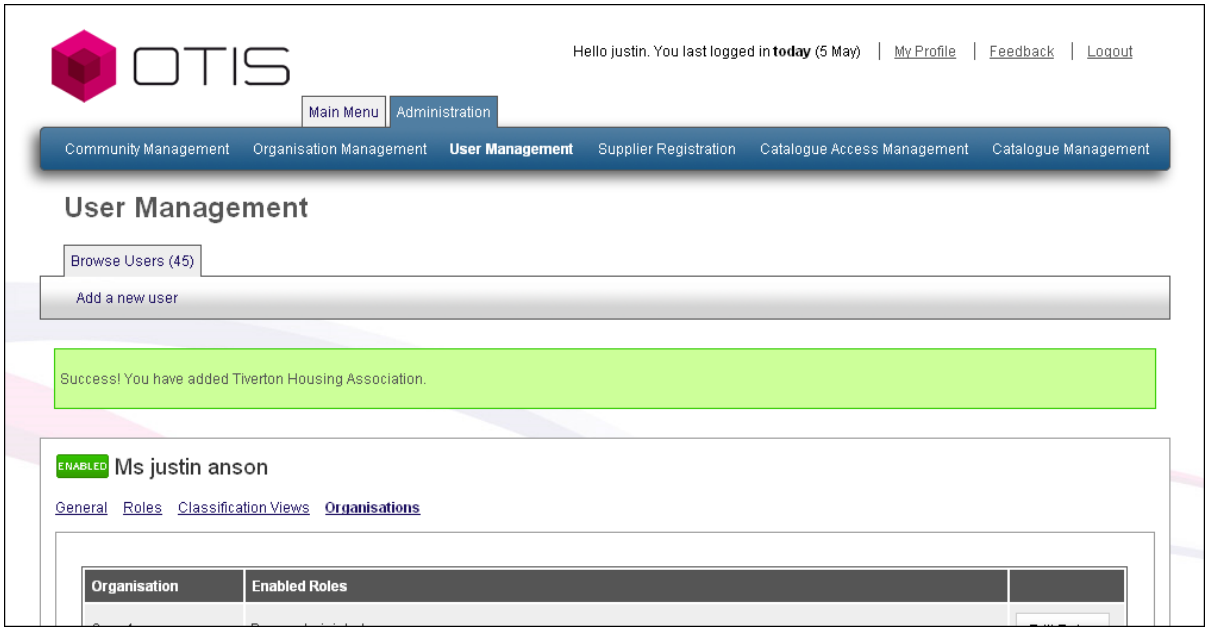
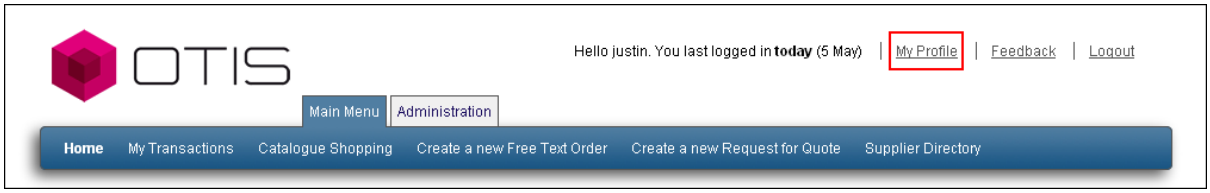
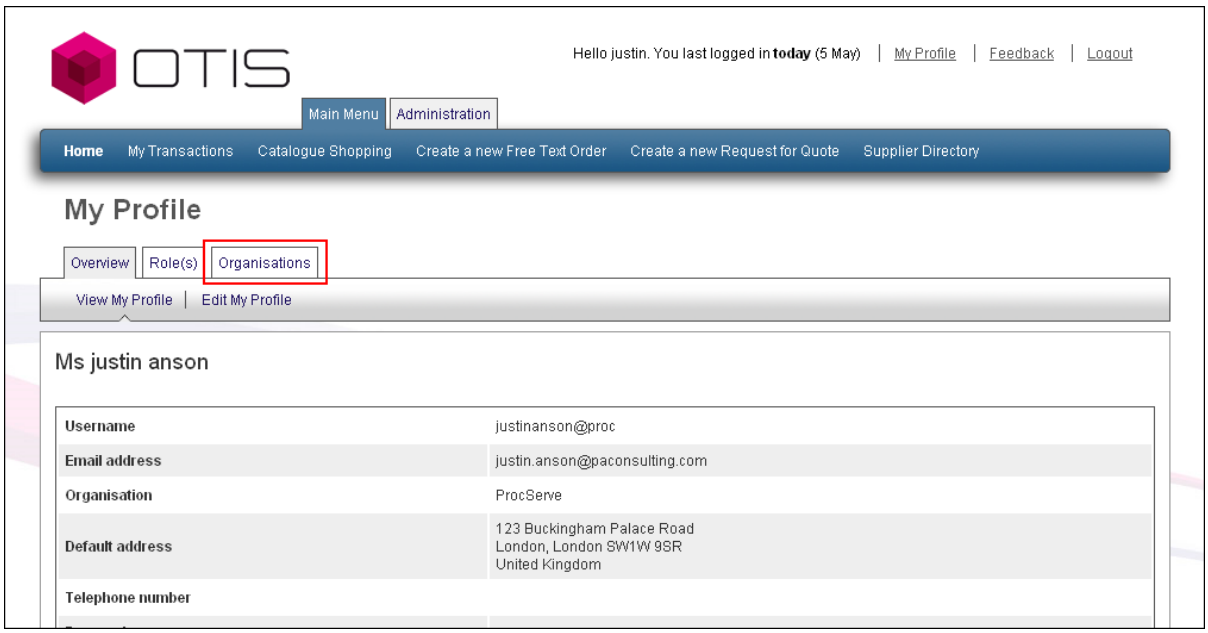

OTIS
Hello justin. You last logged in today (5 May) | My Profile | Feedback | Logout
Main Menu
Administration
Community Management
Organisation Management
User Management
Supplier Registration
Catalogue Access Management
Catalogue Management
User Management
Browse Users (45)
Add a new user
Success! You have added Tiverton Housing Association.
ENABLED
Ms justin anson
General
Roles
Classification Views
Organisations
Organisation
Enabled Roles

Switching to the Organisation

1. Click on 'My Profile'



2. Click on the' Organisations' tab



You will then be presented with the organisations you can switch too.

3. Click on the 'Switch to' button next to the organisation you wish to switch to

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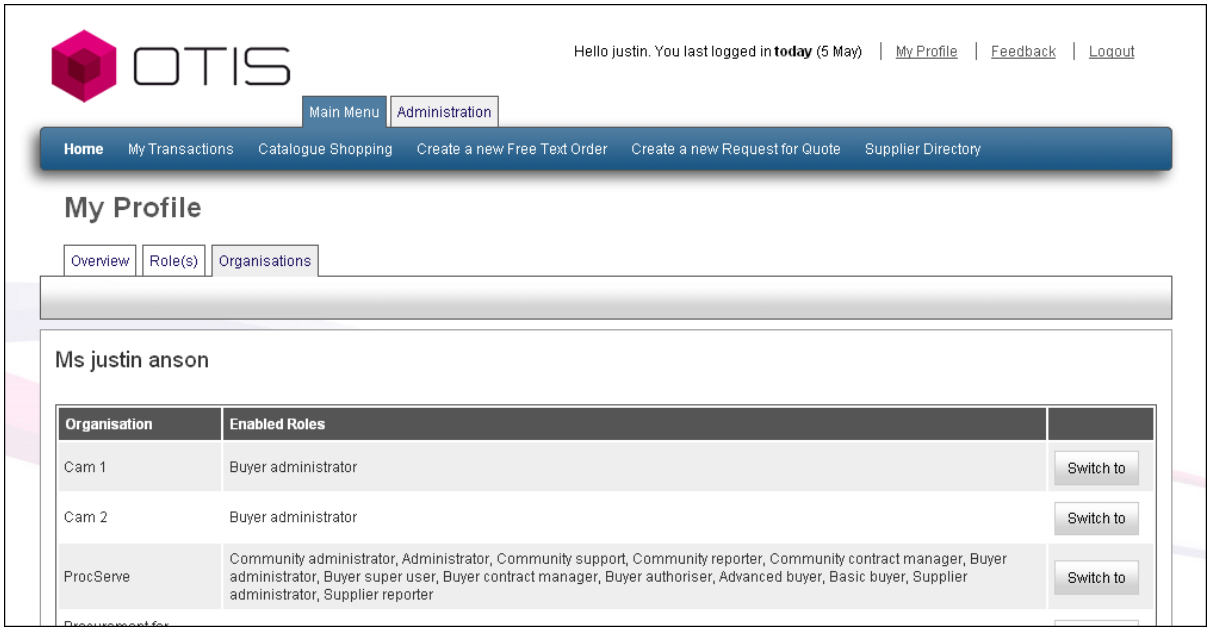
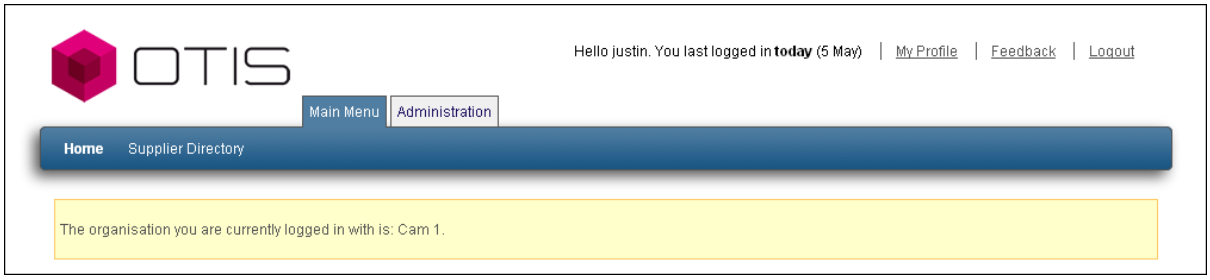


When you have switched organisation you will have the roles assigned to the user for that organisation. You will also be presented with a text box stating which organisation you are currently working as.


OTIS
Hello justin. You last logged in today (5 May) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
The organisation you are currently logged in with is: Cam 1.

To switch back you can either go to 'My Profile' and select your organisation or log out and log in again.

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2.3.2.2 Hybrid Communities

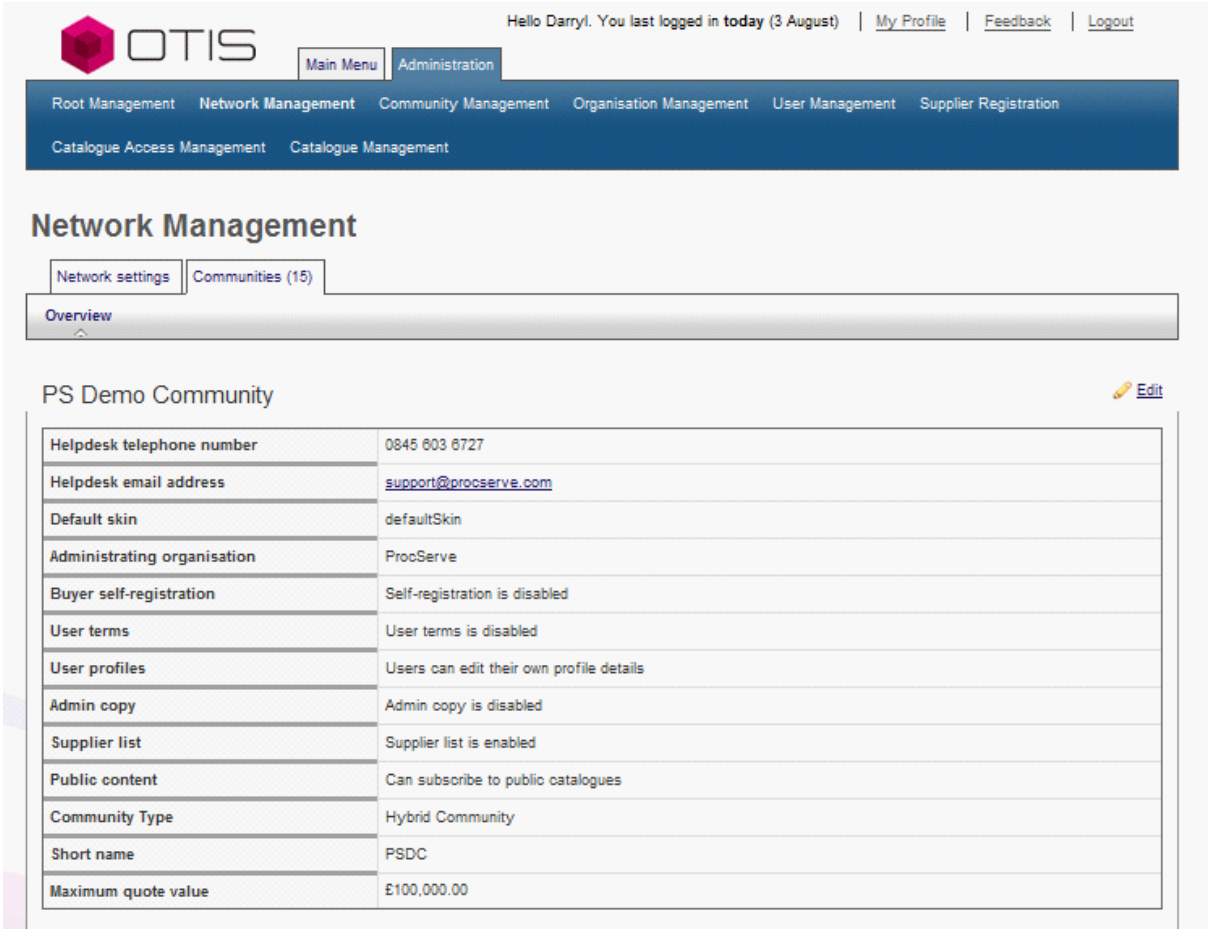
2.3.2.2.1 Overview

A ‘Hybrid Community’ is used where a community has a significant need to share content but still require individual buying organisation to control some of their content, in particular double Punch-Out suppliers.

Managing the sharing of catalogues and classification views will be done from OTIS. The community members will have a list of catalogues available to them. The catalogues available consist of:

- Network catalogues available to the community
- Community catalogues made available to all members
- Catalogues other community members have shared with the buying organisation
- Catalogues shared by network members outside the hybrid community
- Private catalogues only available to the individual buyer

The below shows a Hybrid Community



Under ‘Community Management’ select the Community you want to manage from the drop-down box – in this case the Hybrid community ‘PS Demo Community’

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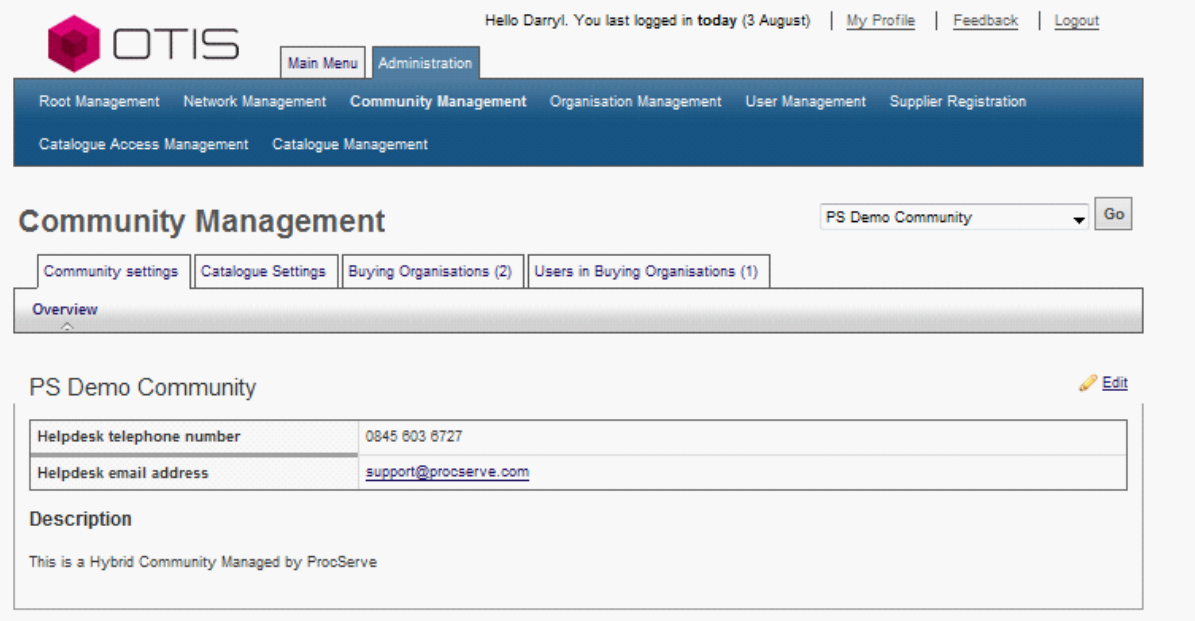
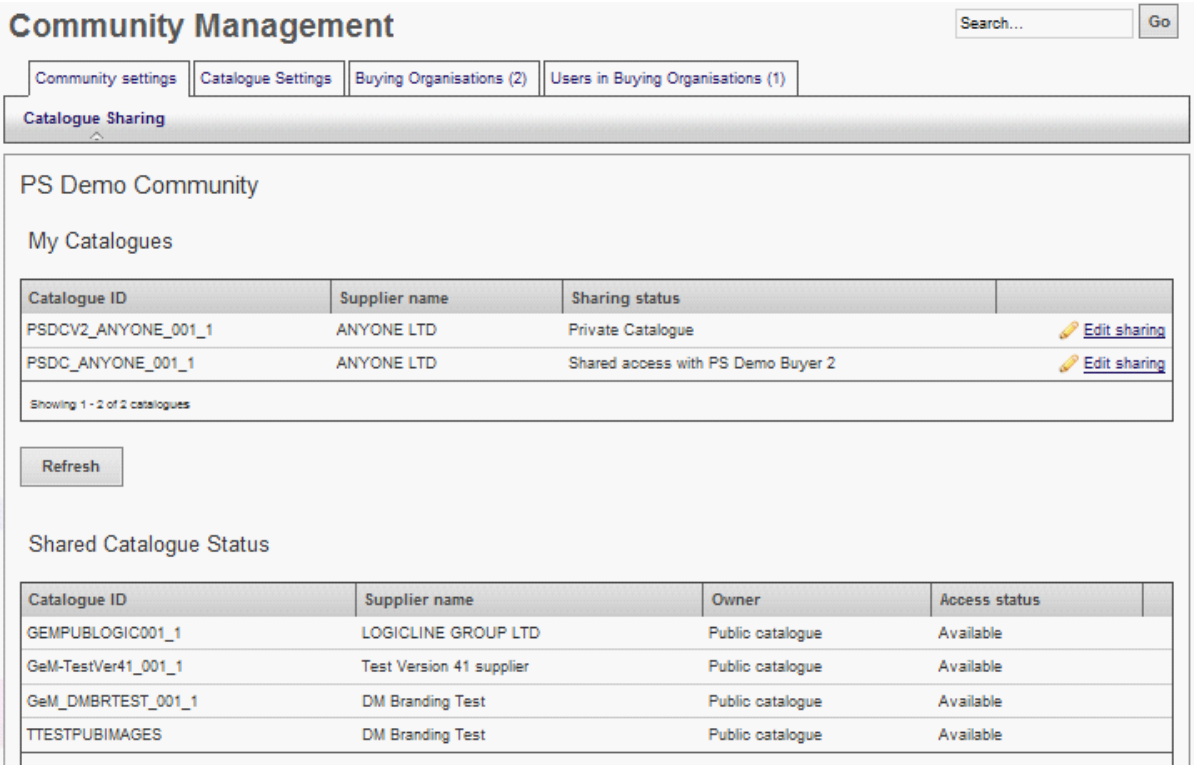


To share catalogues across the community or with specific buying organisations within your community, select 'Catalogue Settings'



Two catalogue types – 'My Catalogues' and 'Shared Catalogues'

Catalogue settings is an additional tab available for Hybrid Communities

To share a catalogue click 'Edit Sharing'. It provides the following options:

- *Shared with whole community* – shares with all Buying organisations in the community

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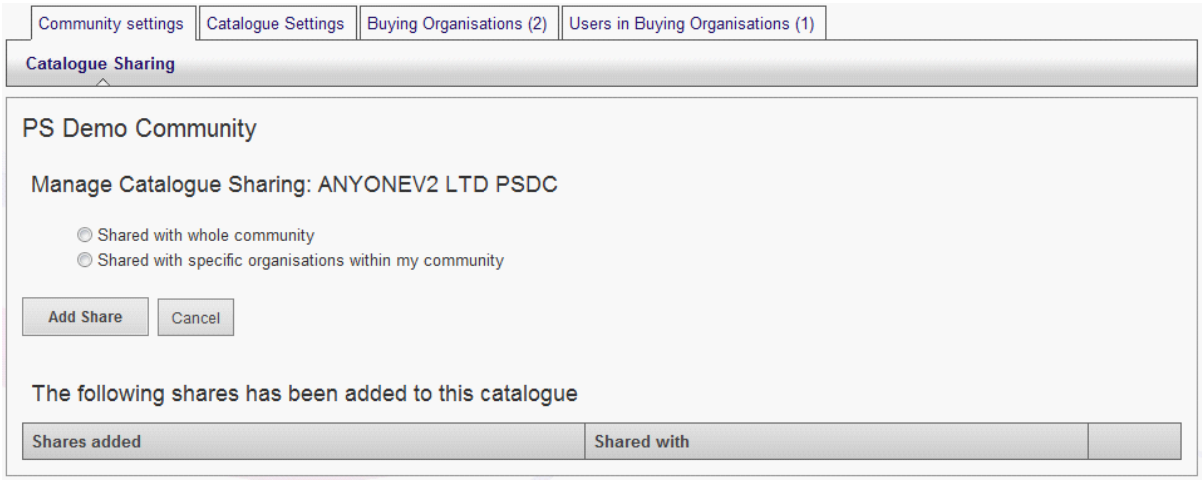
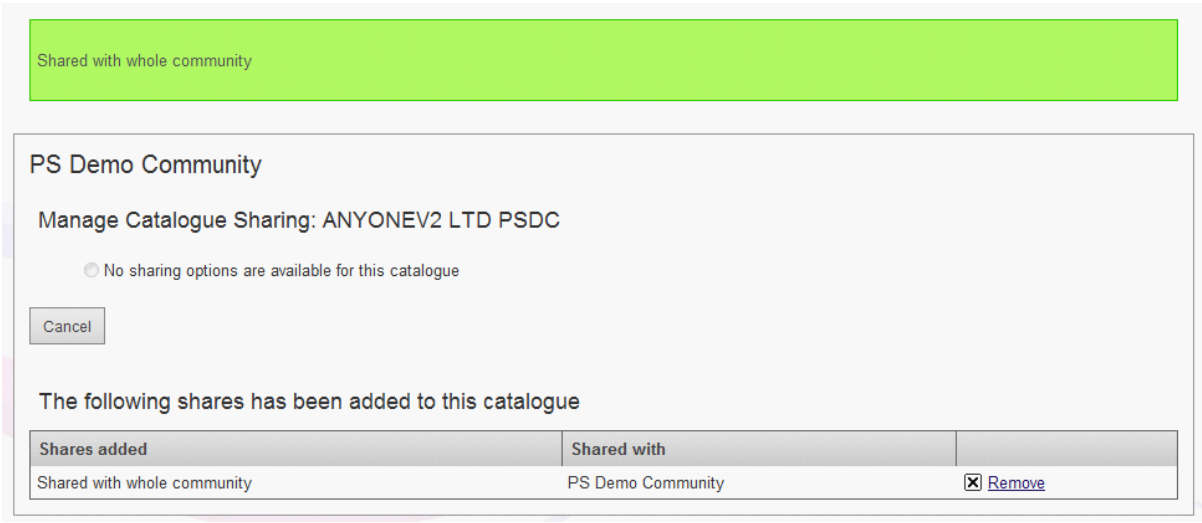
- *Shared with specific organisations within my community* - allows you to select which Buying organisations can have access



Selecting 'Shared with whole community' and clicking 'Add Share' will display the Shared Classification for the catalogue with a green confirmation message:



If you select 'Shared with specific organisations within my community' you will then be prompted to select specific Buying organisations from the community which you can share the catalogue with.

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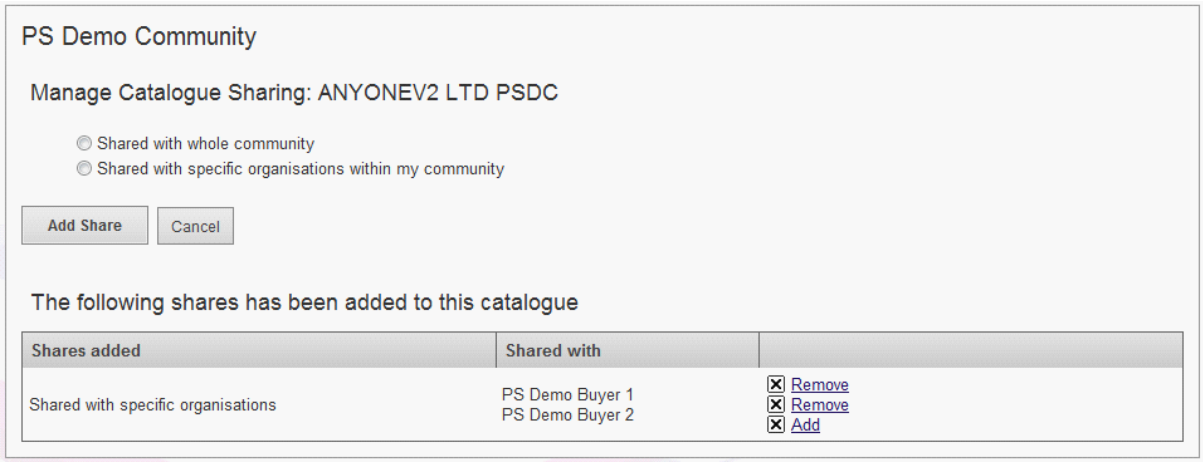
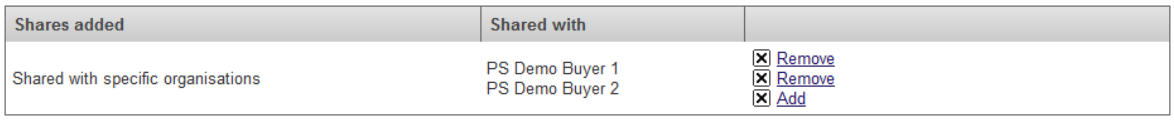
Click ‘Add Share’ against Buying organisation that require access to that catalogue



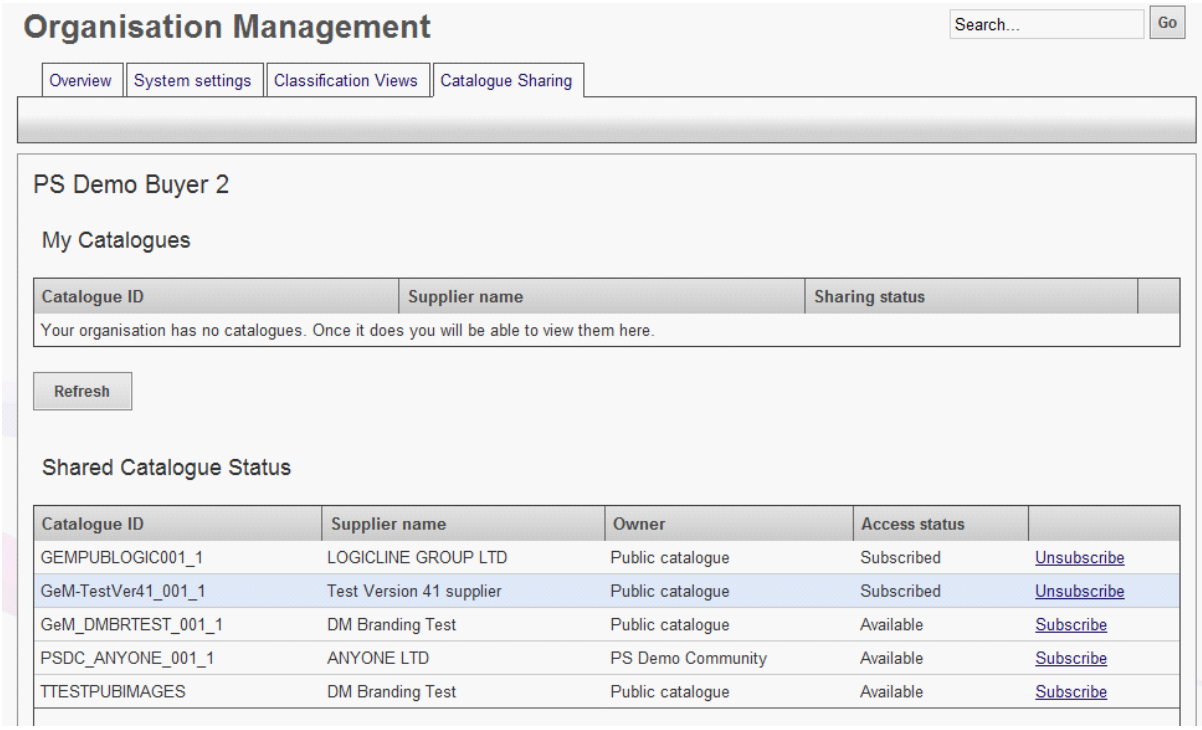
To remove the sharing classification of your catalogue from selected Buying Organisations, simply click ‘Remove’ for that particular Buying organisation from the list of shares.



ORGANISATION MANAGEMENT

As a Buying Organisation that is part of a Hybrid Community you have the ability to subscribe or unsubscribe to catalogues that have been shared with you.

Under the ‘Catalogue Sharing’ tab it will provide a list of shared catalogues, either from the Network, the Community or other Buying organisations.



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2.3.3 Managing your Supplier Adoption

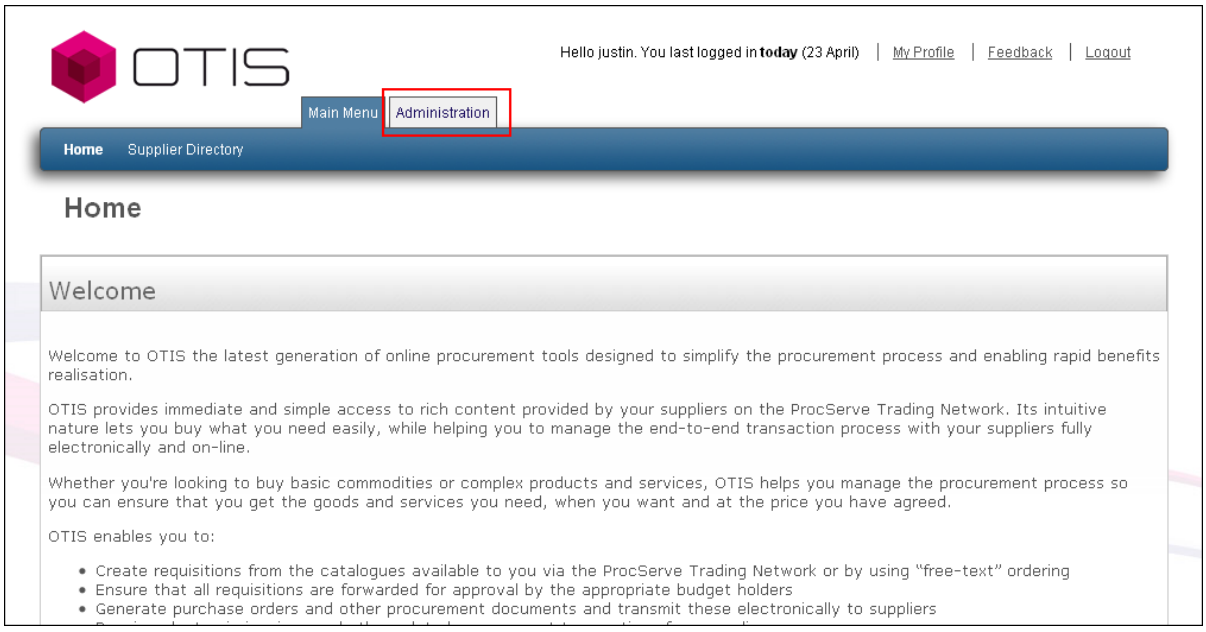
2.3.3.1 Overview of Supplier Registration

Overview

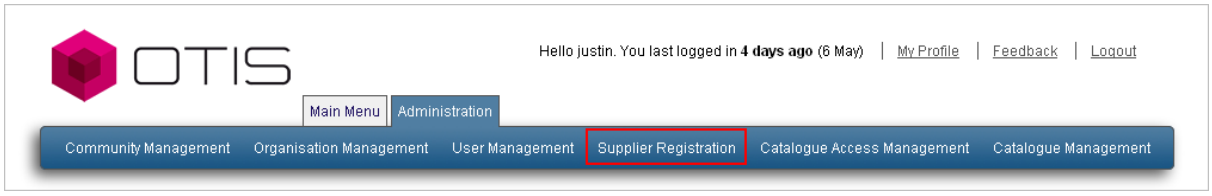
This section describes how you can add new suppliers to the ProcServe Trading Network. By loading a suppliers details they will automatically be added as a basic supplier. This section looks at both the loading process and the tools to progress supplier registration.

Supplier Registration

1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click 'Supplier Registration'



From here you can see the three tabs used in Supplier Registration

Tip! Adding new suppliers

You can invite new suppliers to join the ProcServe Trading Network. For more information on this view the 'Registering New Suppliers'.

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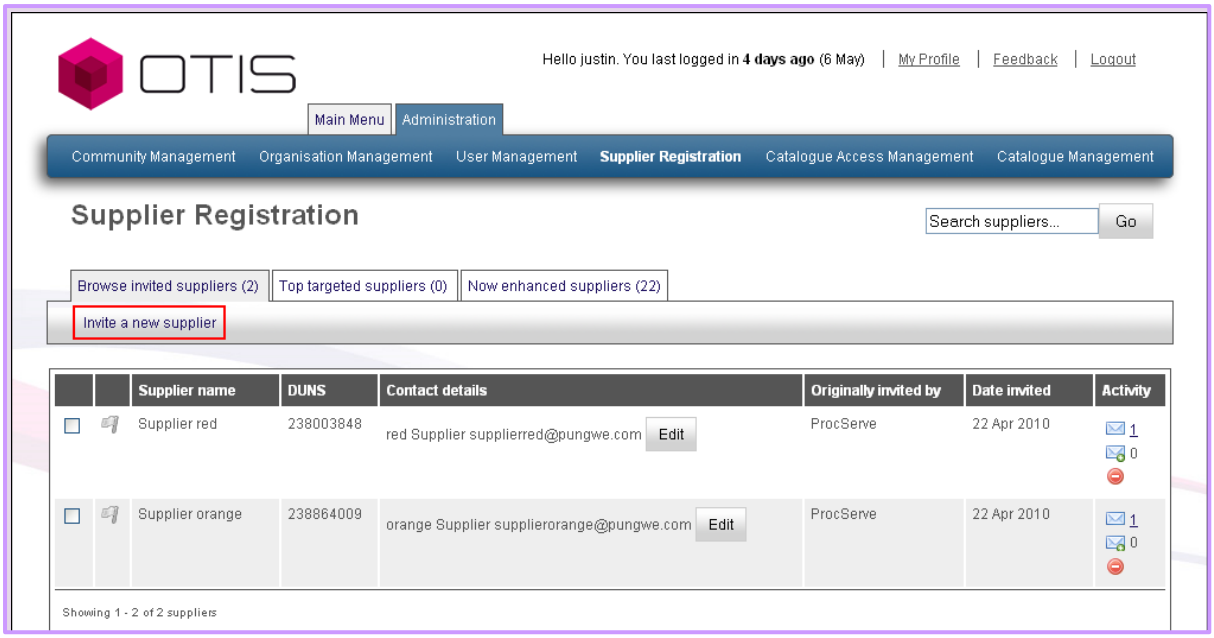
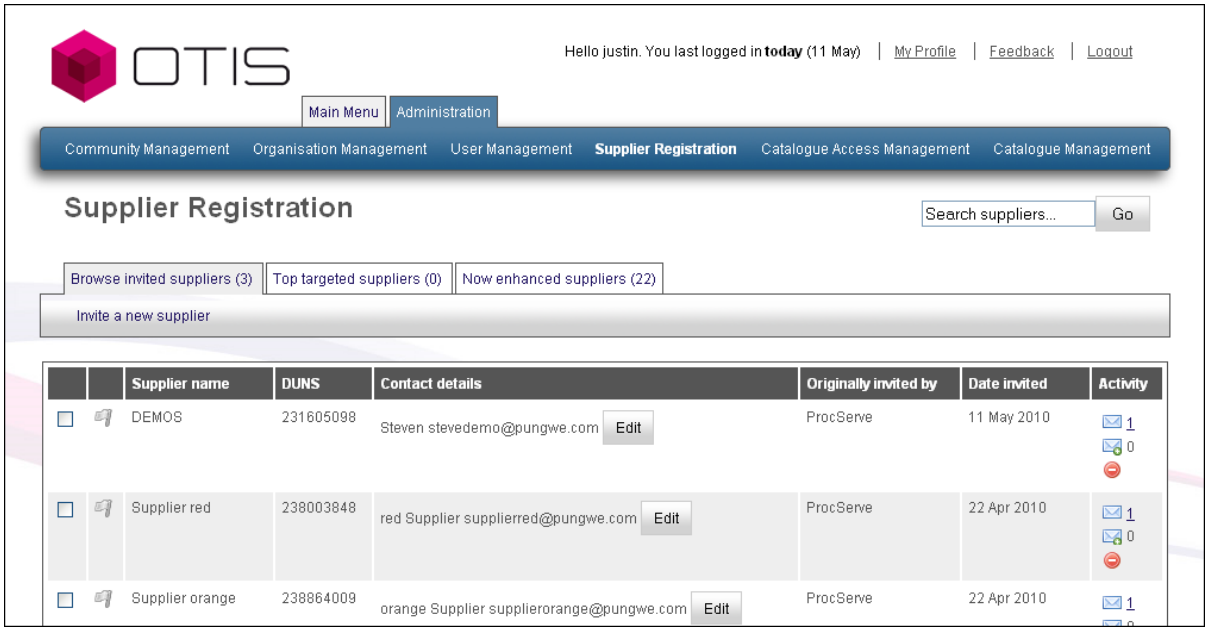


Browse invited suppliers

You can search all the suppliers you have added and have not yet registered. You can also remind selected suppliers to complete registration.



Top targeted suppliers

You can add suppliers to 'Top targeted suppliers' to ensure that you focus effort on adopting these. See the 'Targeting your Suppliers' for more information.

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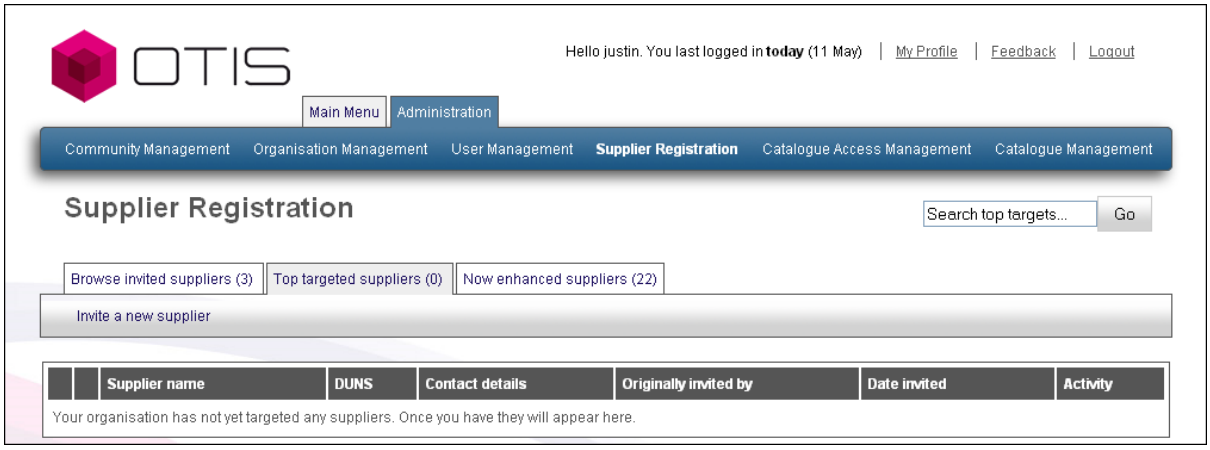
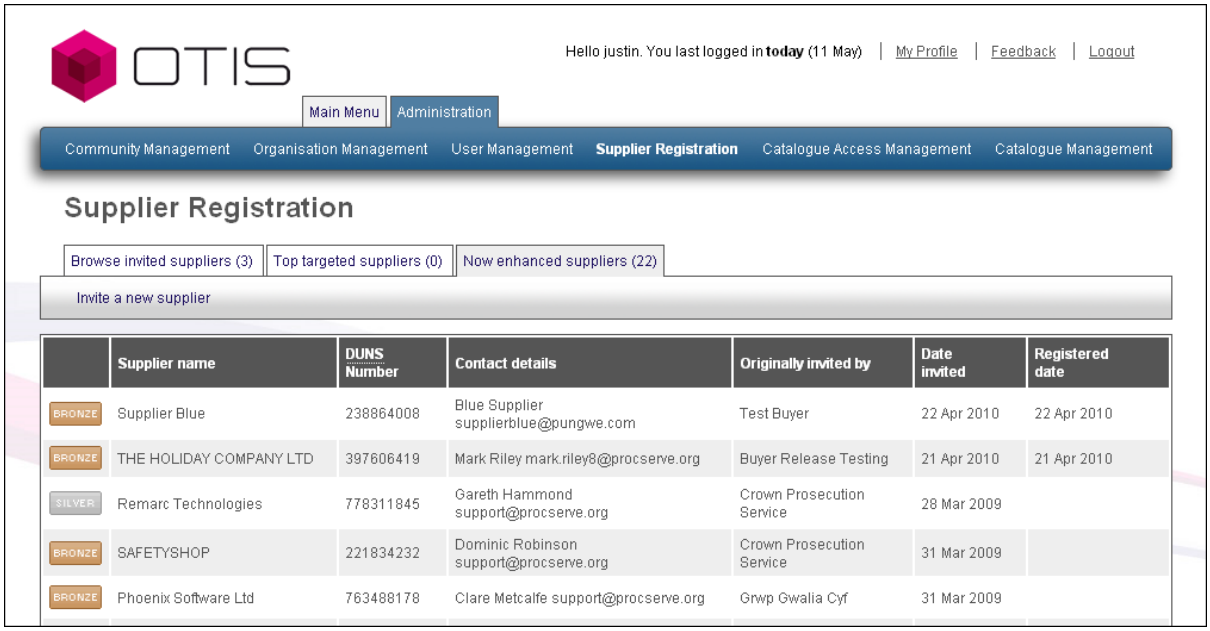


Now enhanced suppliers

You can view the suppliers you have invited that have registered on the ProcServe Trading Network and the status they have achieved. There are three types of enhanced suppliers: Bronze, supplier has agreed the terms and conditions and now has access to the Supplier Portal; Silver, as Bronze and the supplier has provided content; Gold, as silver and the supplier has some form of back office integration.


OTIS
Hello justin. You last logged in today (11 May) | My Profile | Feedback | Logout
Main Menu
Administration
Community Management
Organisation Management
User Management
Supplier Registration
Catalogue Access Management
Catalogue Management
Supplier Registration
Browse invited suppliers (3)
Top targeted suppliers (0)
Now enhanced suppliers (22)
Invite a new supplier
Supplier name
DUNS Number
Contact details
Originally invited by
Date invited
Registered date
BRONZE Supplier Blue 238864008 Blue Supplier supplierblue@pungwe.com Test Buyer 22 Apr 2010 22 Apr 2010
BRONZE THE HOLIDAY COMPANY LTD 397606419 Mark Riley mark.riley8@procserve.org Buyer Release Testing 21 Apr 2010 21 Apr 2010
SILVER Remarc Technologies 778311845 Gareth Hammond support@procserve.org Crown Prosecution Service 28 Mar 2009
BRONZE SAFETYSHOP 221834232 Dominic Robinson support@procserve.org Crown Prosecution Service 31 Mar 2009
BRONZE Phoenix Software Ltd 763488178 Clare Metcalfe support@procserve.org Grwp Gwalia Cyf 31 Mar 2009

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2.3.3.2 Registering New Suppliers

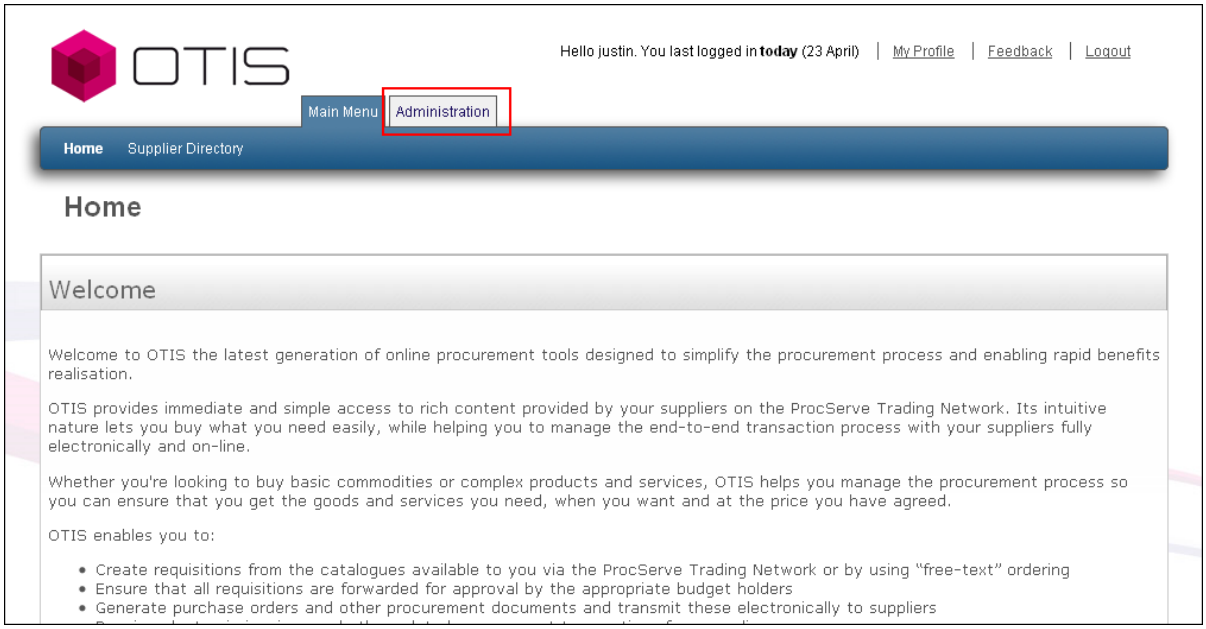
Overview

Dependant on your role, you can invite and add new suppliers for yours and on behalf of other organisations using Supplier Registration.

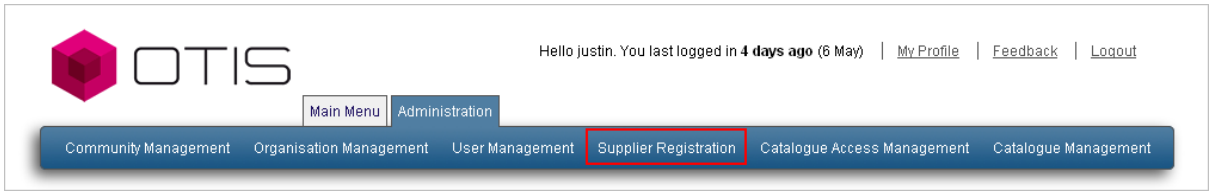
Note: Dependant on your community and organisation setup some of the screens and steps may appear differently.

To add a new Supplier to the marketplace

1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click 'Supplier Registration'



From here you will see all suppliers that you have invited and are currently in the registration process.

3. Click 'Invite a new supplier'

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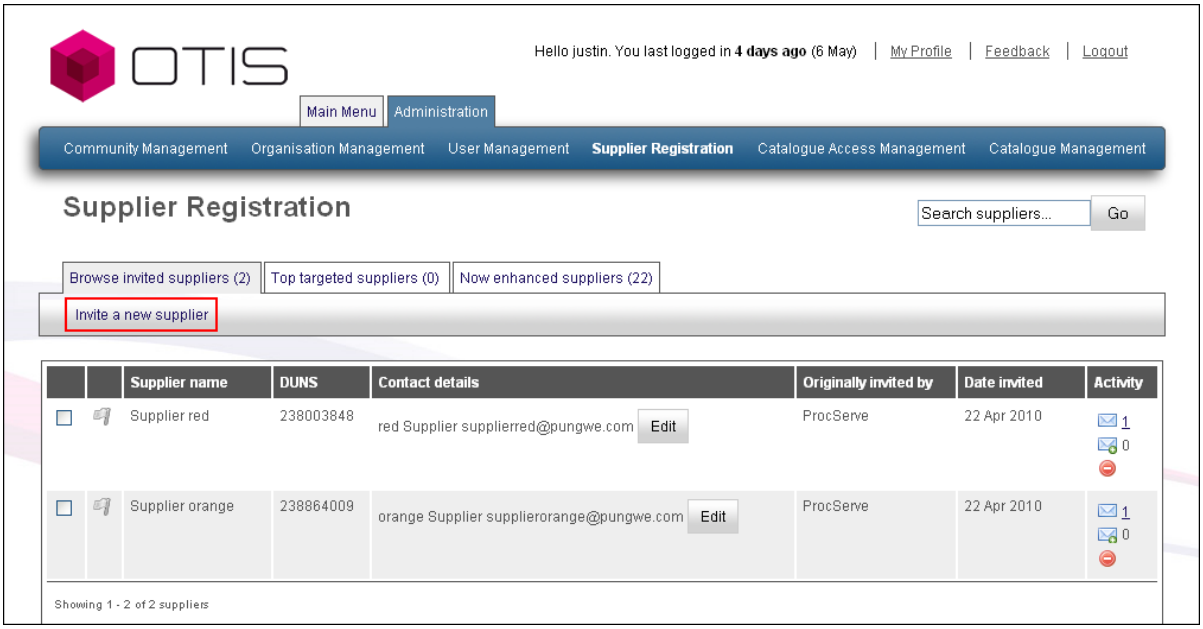
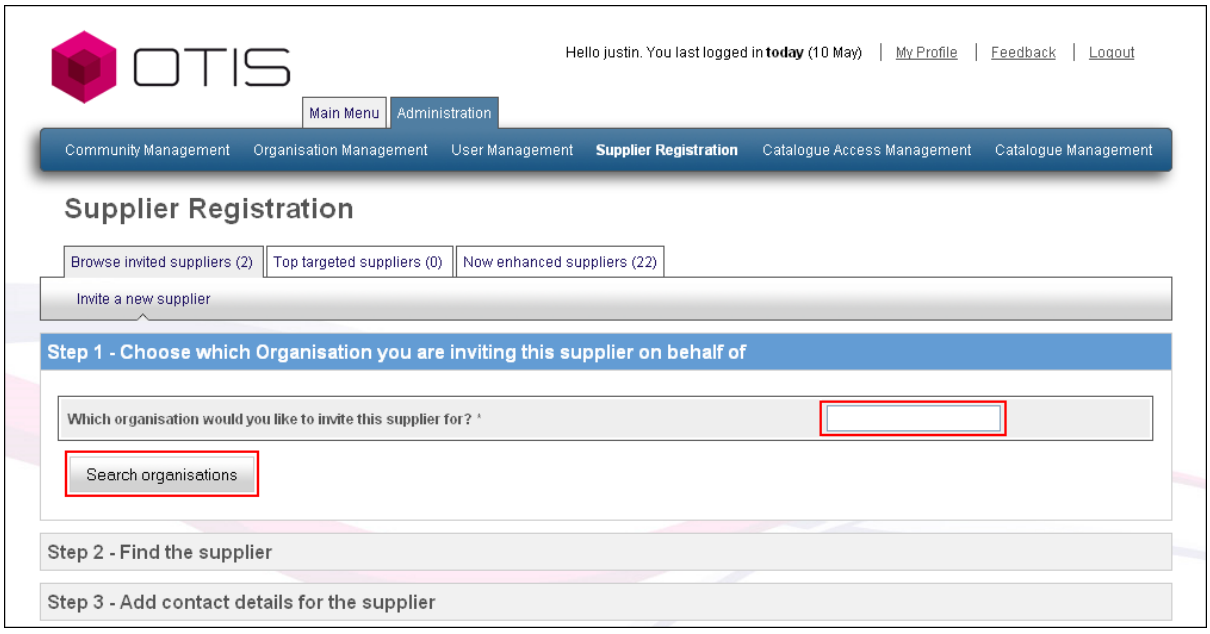


NOTE: Steps 4 and 5 only apply for the Community Administrator.

4. Search for the buying organisation you wish to register the supplier for.


OTIS
Hello justin. You last logged in today (10 May) | My Profile | Feedback | Logout
Main Menu
Administration
Community Management
Organisation Management
User Management
Supplier Registration
Catalogue Access Management
Catalogue Management
Supplier Registration
Browse invited suppliers (2)
Top targeted suppliers (0)
Now enhanced suppliers (22)
Invite a new supplier
Step 1 - Choose which Organisation you are inviting this supplier on behalf of
Which organisation would you like to invite this supplier for? *
Search organisations
Step 2 - Find the supplier
Step 3 - Add contact details for the supplier

5. Choose the buying organisation you are inviting the supplier on behalf of and click 'Invite supplier for this organisation'

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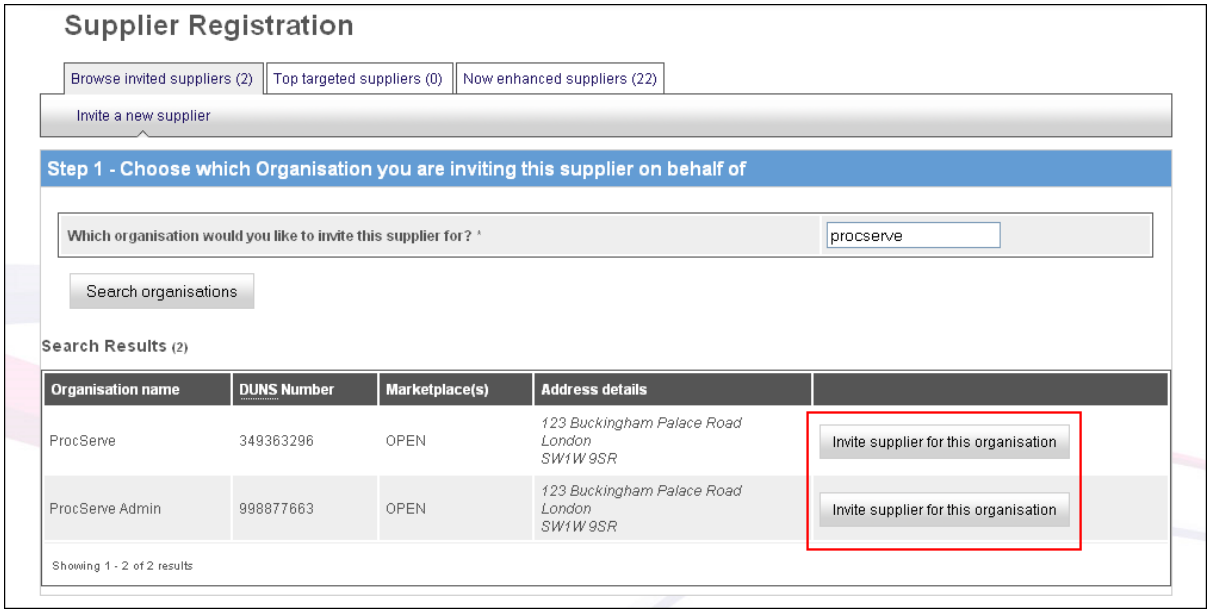
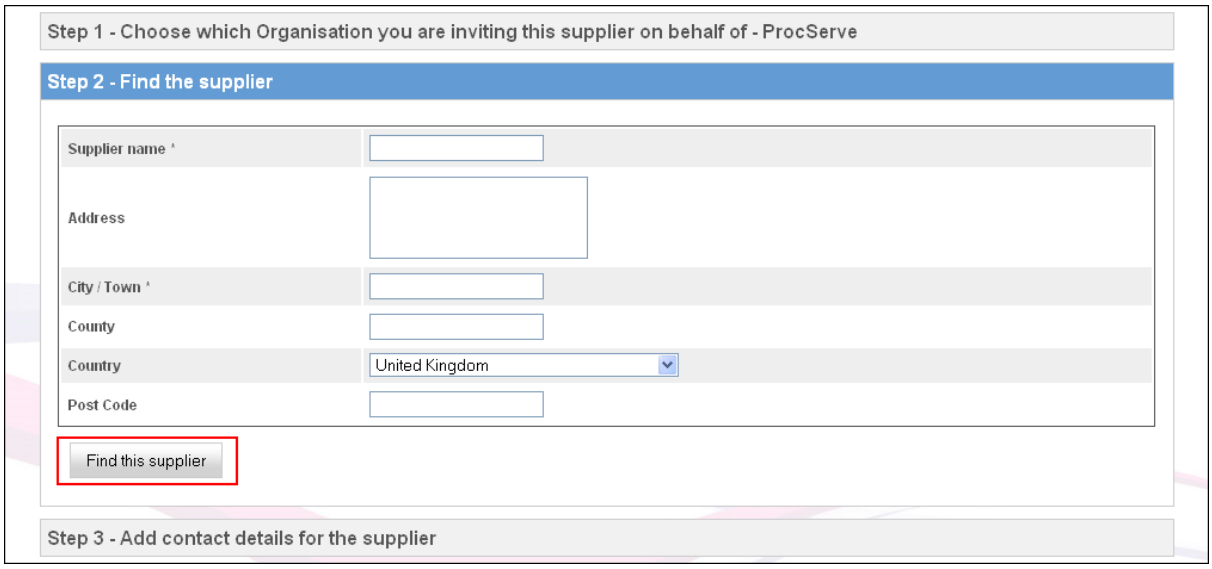


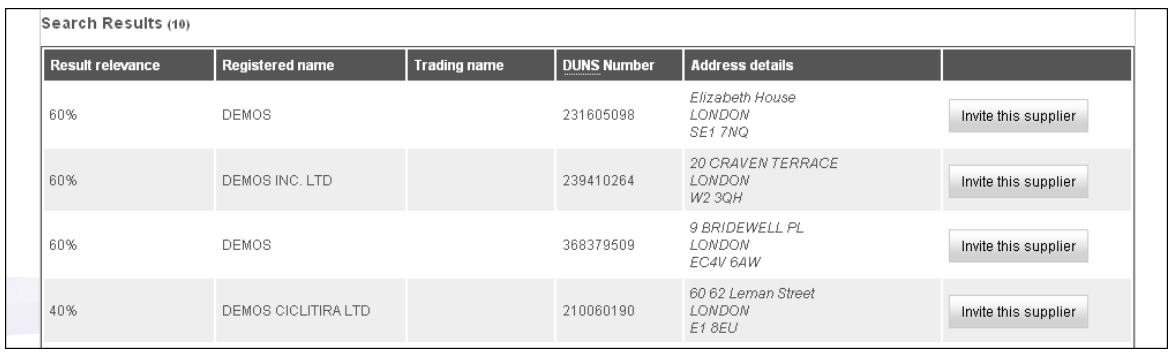
6. Fill in the web form to search for the details of the supplier


Step 1 - Choose which Organisation you are inviting this supplier on behalf of - ProcServe
Step 2 - Find the supplier
Supplier name *
Address
City / Town *
County
Country
United Kingdom
Post Code
Find this supplier
Step 3 - Add contact details for the supplier

7. When complete click 'Find this supplier'

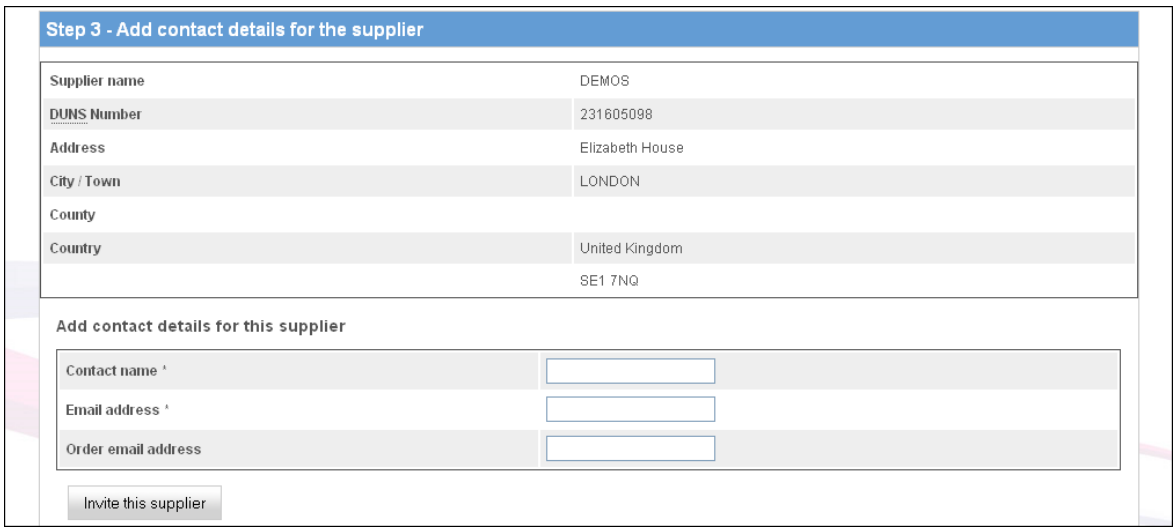
Your results will be shown at the bottom of the page.

8. Click 'Invite this supplier' to select your chosen supplier

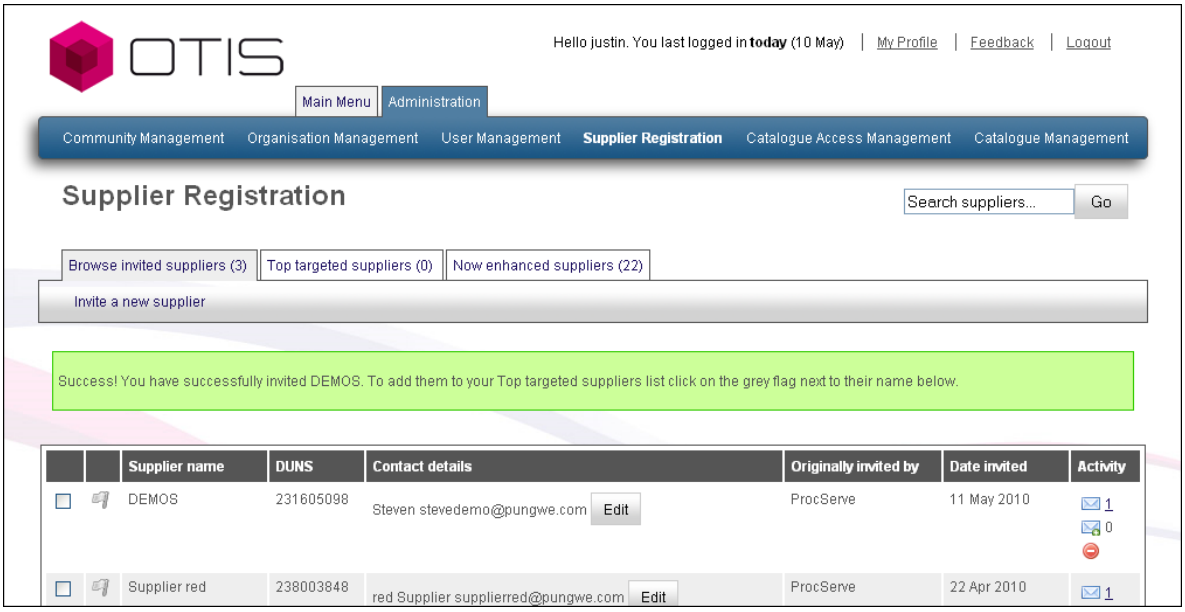


© ProcServe Holdings Limited 2012

9. Add the contact details for the supplier and click 'Invite this supplier'



You should then get a success message.



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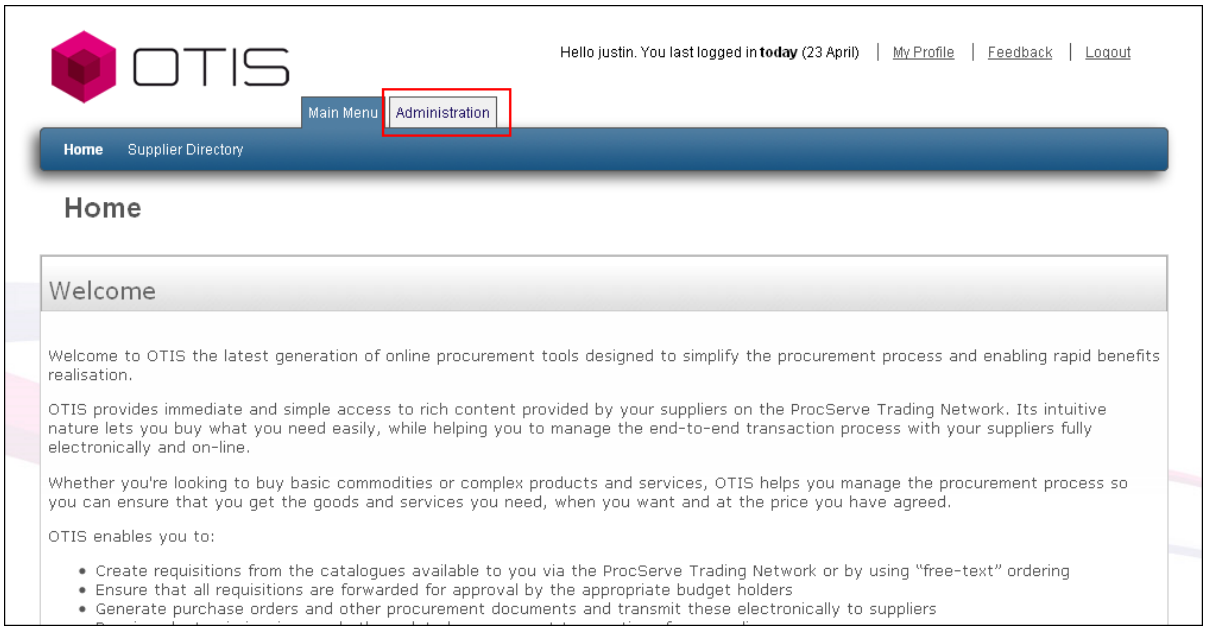
2.3.3.3 Reminding Suppliers to Join

Overview

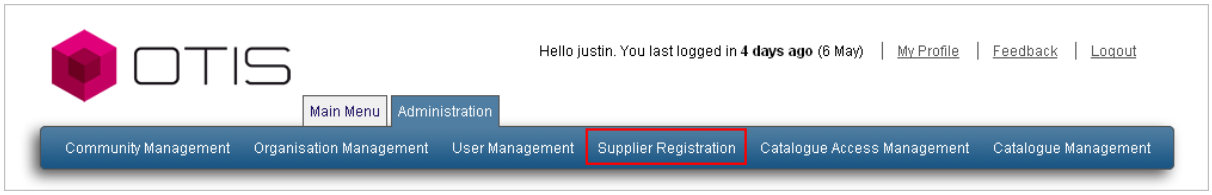
Once a supplier has been invited to join the ProcServe Trading Network you can remind them to complete their registration.

Sending reminders to suppliers

1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click 'Supplier Registration'



From here you will see all suppliers that you have invited and are currently in the registration process.

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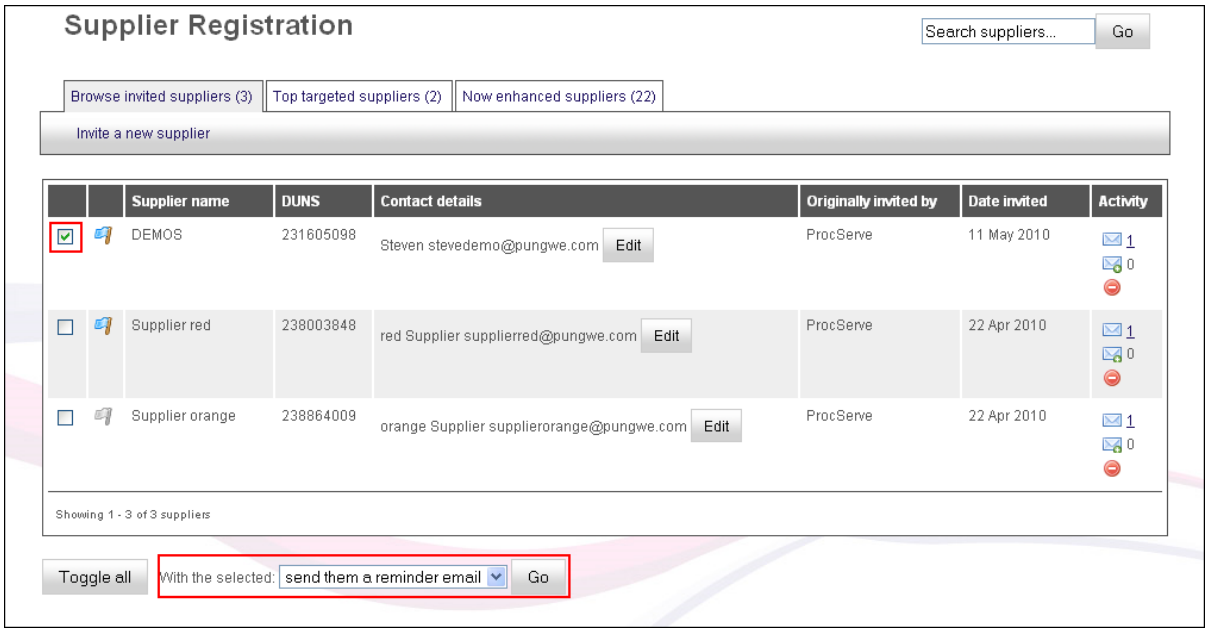
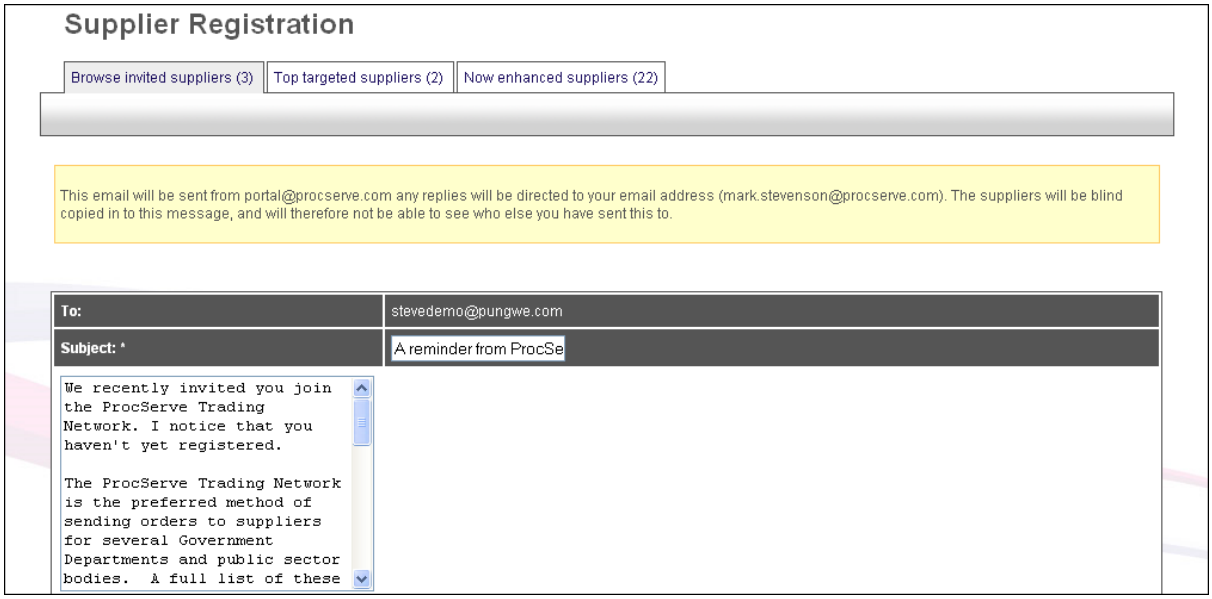
Tip! To focus your supplier adoption - use the top targeted tab and invite suppliers from there as a priority.

3. Tick the box next the supplier you wish to remind and then at the footer of the page click 'Go'

Tip! More than one supplier can be reminded at a time by selecting multiple boxes.



You will then be presented with the email wizard for sending a reminder email.


Supplier Registration
Browse invited suppliers (3)
Top targeted suppliers (2)
Now enhanced suppliers (22)
This email will be sent from portal@procserve.com any replies will be directed to your email address (mark.stevenson@procserve.com). The suppliers will be blind copied in to this message, and will therefore not be able to see who else you have sent this to.
To:
stevedemo@pungwe.com
Subject: *
A reminder from ProcSe
We recently invited you join the ProcServe Trading Network. I notice that you haven't yet registered.
The ProcServe Trading Network is the preferred method of sending orders to suppliers for several Government Departments and public sector bodies. A full list of these

Note: You can change some of the text in the reminder email but the second half remains static as this contains the important registration details.

4. When satisfied with the email click 'Send' at the footer of the page.

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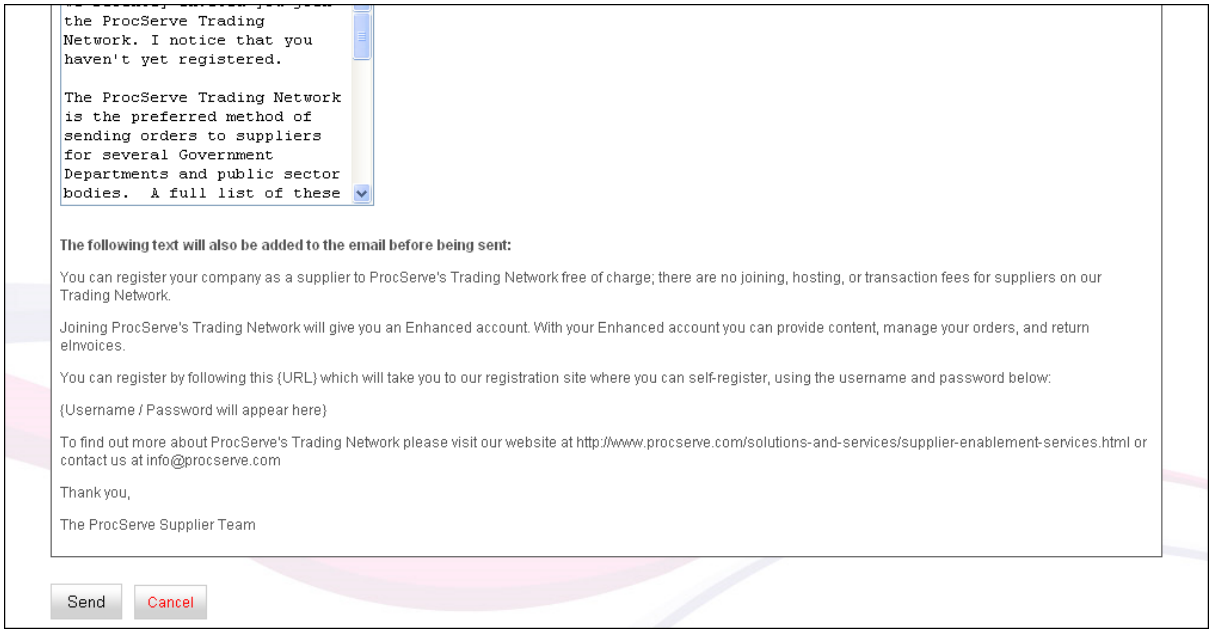
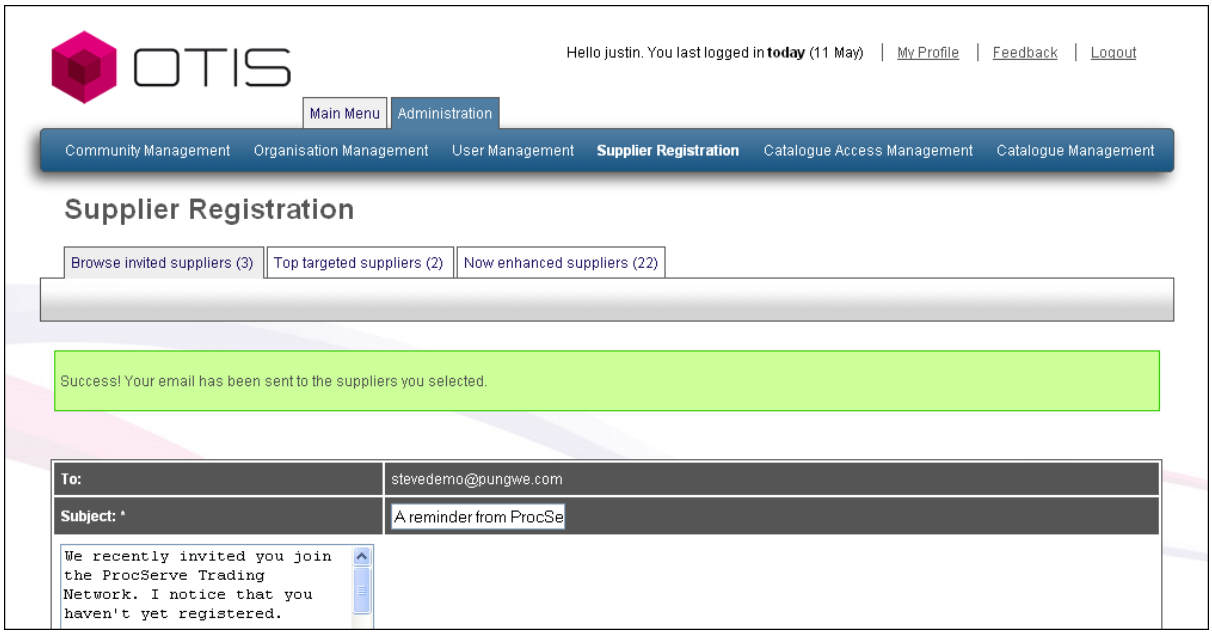

the ProcServe Trading Network. I notice that you haven't yet registered.
The ProcServe Trading Network is the preferred method of sending orders to suppliers for several Government Departments and public sector bodies. A full list of these
The following text will also be added to the email before being sent:
You can register your company as a supplier to ProcServe's Trading Network free of charge; there are no joining, hosting, or transaction fees for suppliers on our Trading Network.
Joining ProcServe's Trading Network will give you an Enhanced account. With your Enhanced account you can provide content, manage your orders, and return eInvoices.
You can register by following this {URL} which will take you to our registration site where you can self-register, using the username and password below:
{Username / Password will appear here}
To find out more about ProcServe's Trading Network please visit our website at http://www.procserve.com/solutions-and-services/supplier-enablement-services.html or contact us at info@procserve.com
Thank you,
The ProcServe Supplier Team
Send
Cancel

Once the email has been sent you will get a success message.


OTIS
Hello justin. You last logged in today (11 May) | My Profile | Feedback | Logout
Main Menu
Administration
Community Management
Organisation Management
User Management
Supplier Registration
Catalogue Access Management
Catalogue Management
Supplier Registration
Browse invited suppliers (3)
Top targeted suppliers (2)
Now enhanced suppliers (22)
Success! Your email has been sent to the suppliers you selected.
To:
stevedemo@pungwe.com
Subject: *
A reminder from ProcSe
We recently invited you join the ProcServe Trading Network. I notice that you haven't yet registered.

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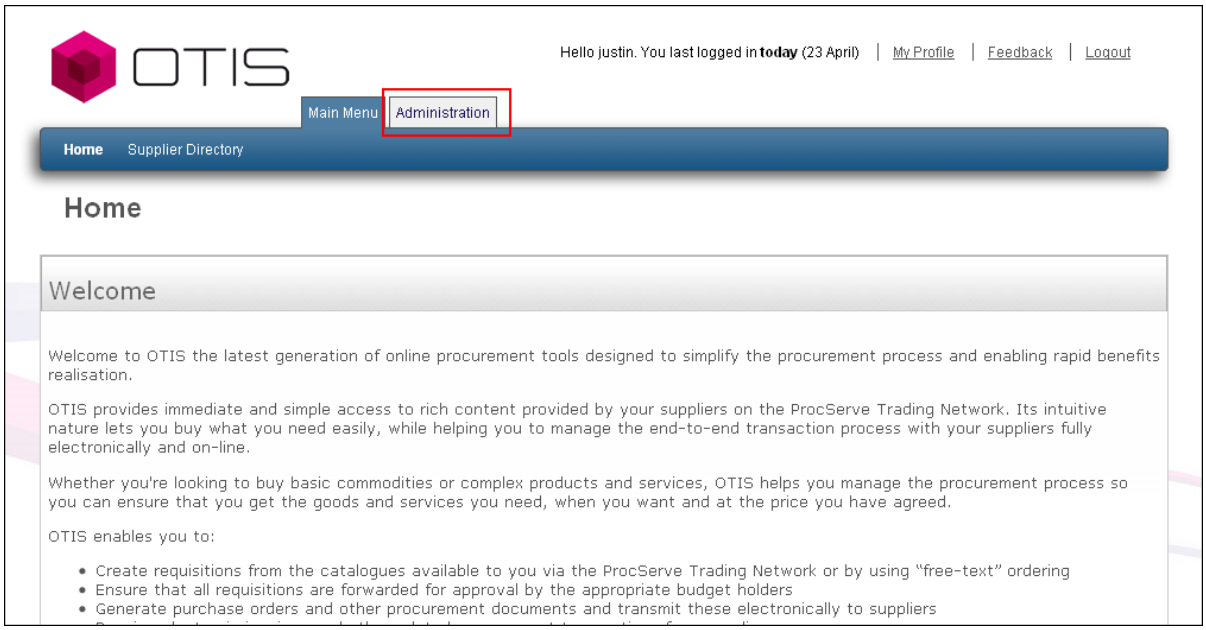
2.3.3.4 Targeting your Suppliers

Overview

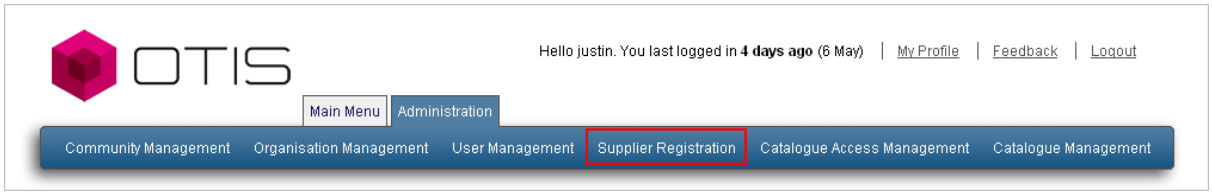
You can target certain suppliers you have invited to join the ProcServe Trading Network. You can use this feature to make it easier to send reminder emails and track the status of priority suppliers.

Viewing your top targeted suppliers

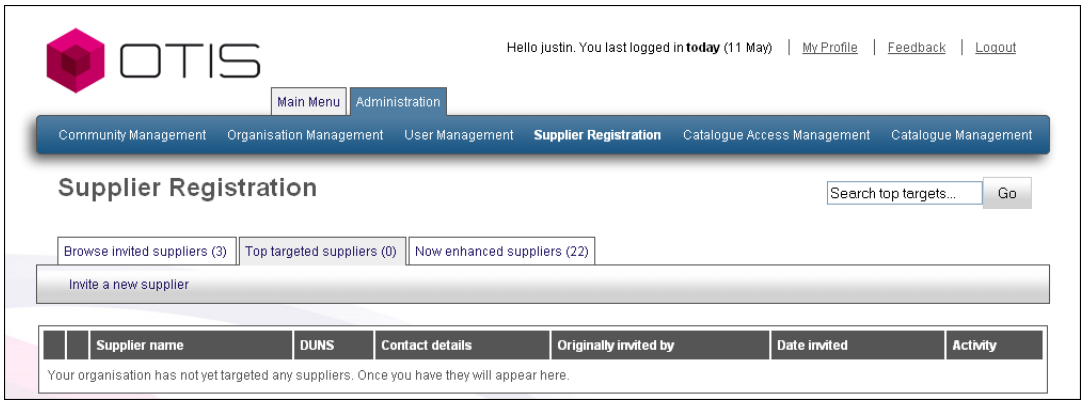
1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click 'Supplier Registration'



3. Click on 'Top targeted suppliers'



You can view all the suppliers in your top target list.

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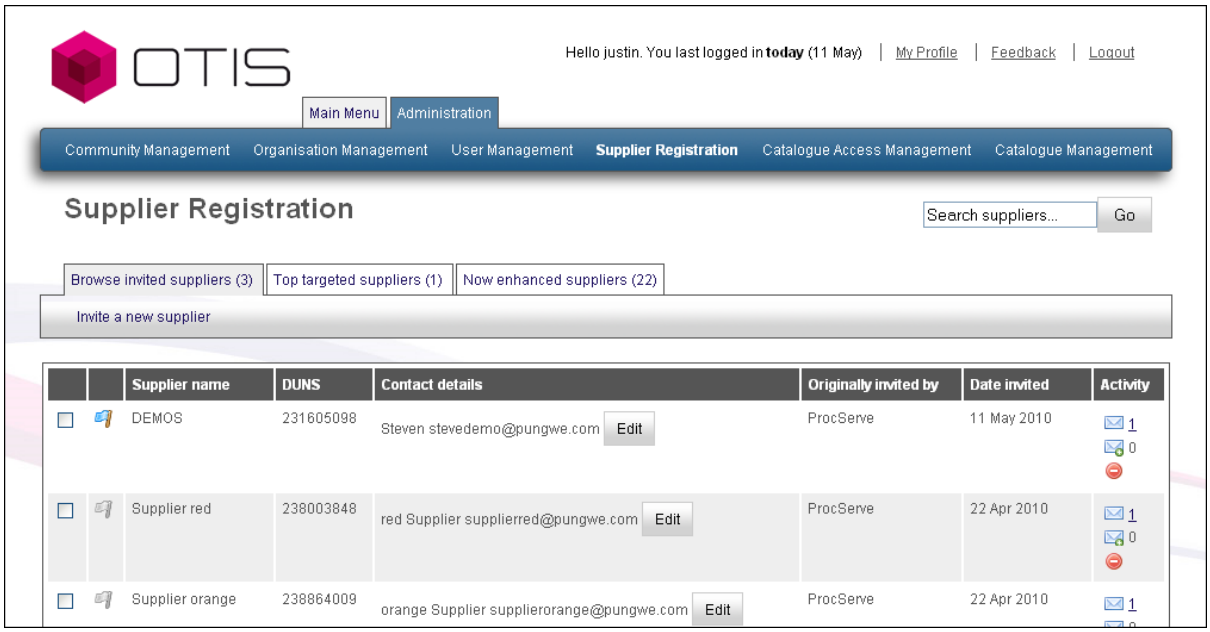
2.3.3.4.1 Adding a new supplier to your top targeted list

Overview

You can dynamically add and remove suppliers from your 'Top targeted suppliers' tab.

1. Search for the supplier in 'Browse invited suppliers'

2. Select the organisation you wish to add to the 'Top targeted suppliers' tab by clicking the flag.



Your 'Top targeted suppliers' tab will now be updated with the number of suppliers targeted.

Tip! You can remove suppliers from the top targeted list by clicking the flag.

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2.3.4 Managing your Users

2.3.4.1 Introduction to User Management

Overview

You can add, edit and deactivate users within your organisation in 'User Management'.

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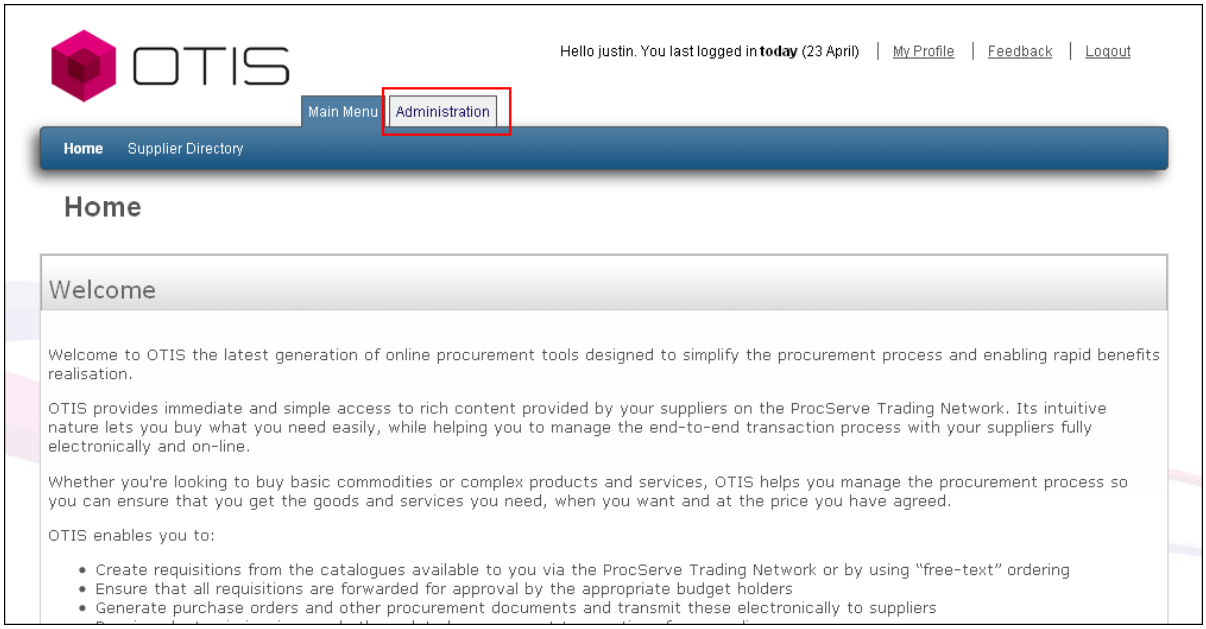
2.3.4.2 Editing an Existing User

Overview

You can edit the basic details of a user in User Management.

To edit a user

1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
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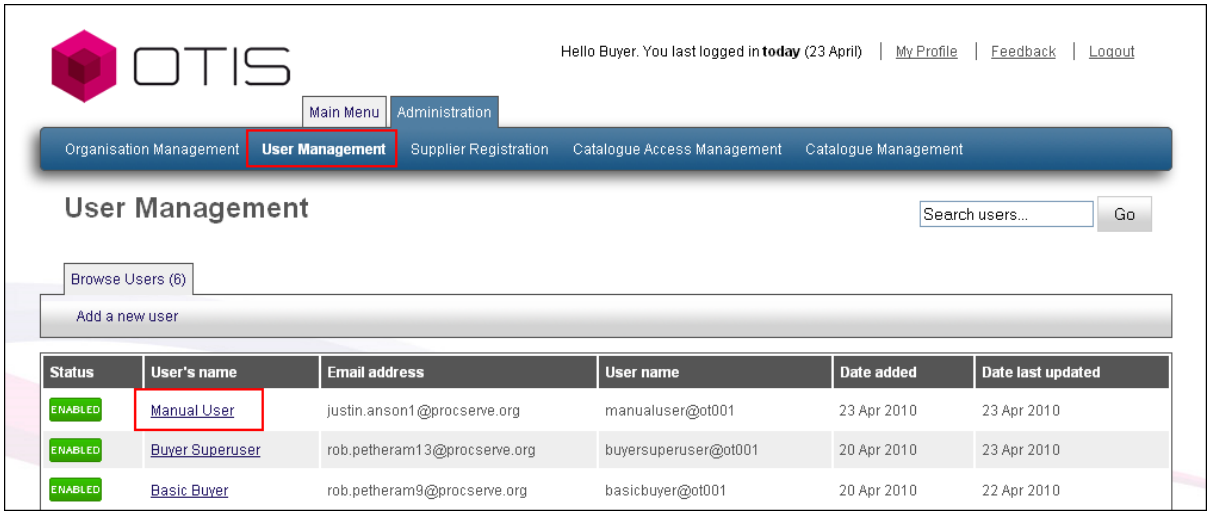
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

2. Click on 'User Management' and then the link of the user you wish to add to an organisation



3. Click on 'Edit general information'

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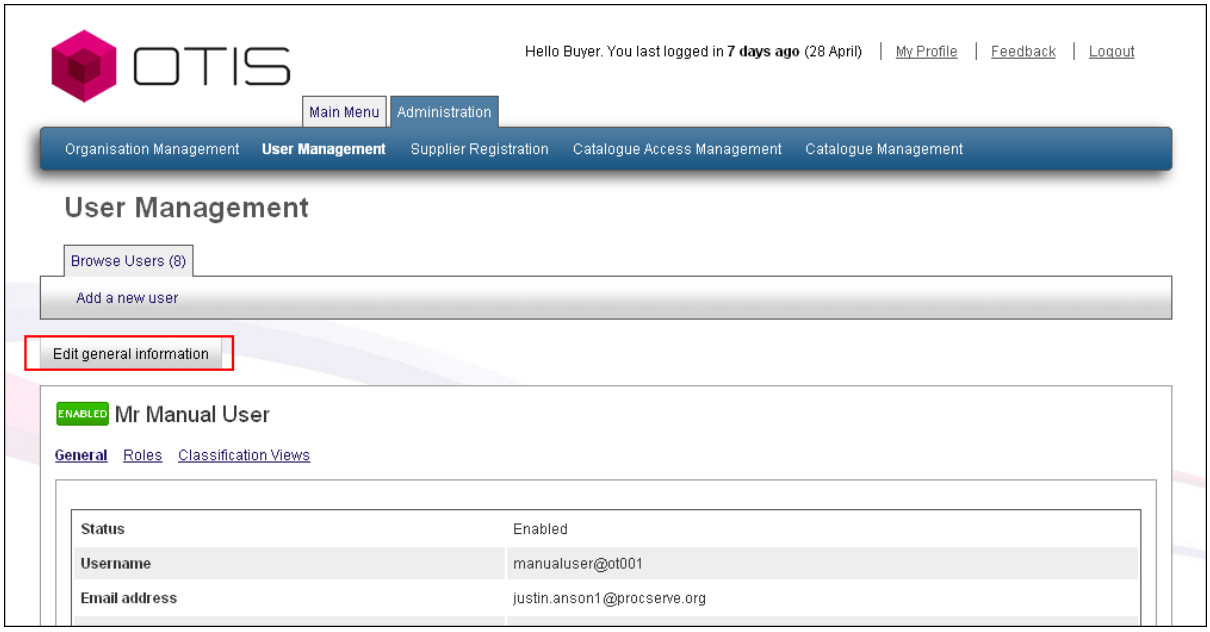

4. When complete click 'Save' at the footer of the page

Note: You can also edit the roles the user has access to on the 'Roles' button.

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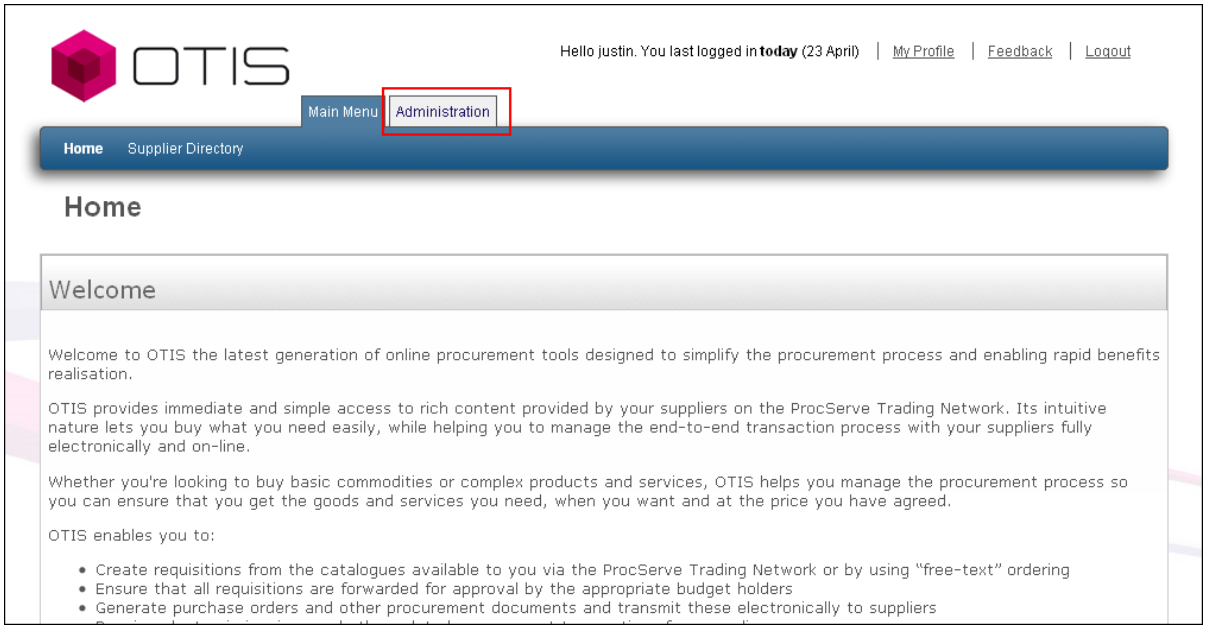
2.3.4.3 Editing the Roles a User has in an Organisation

Overview

At any time you can amend a users role they have within an organisation.

To edit the roles of a user

1. Click on the 'Administration' tab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Administration
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Supplier Directory
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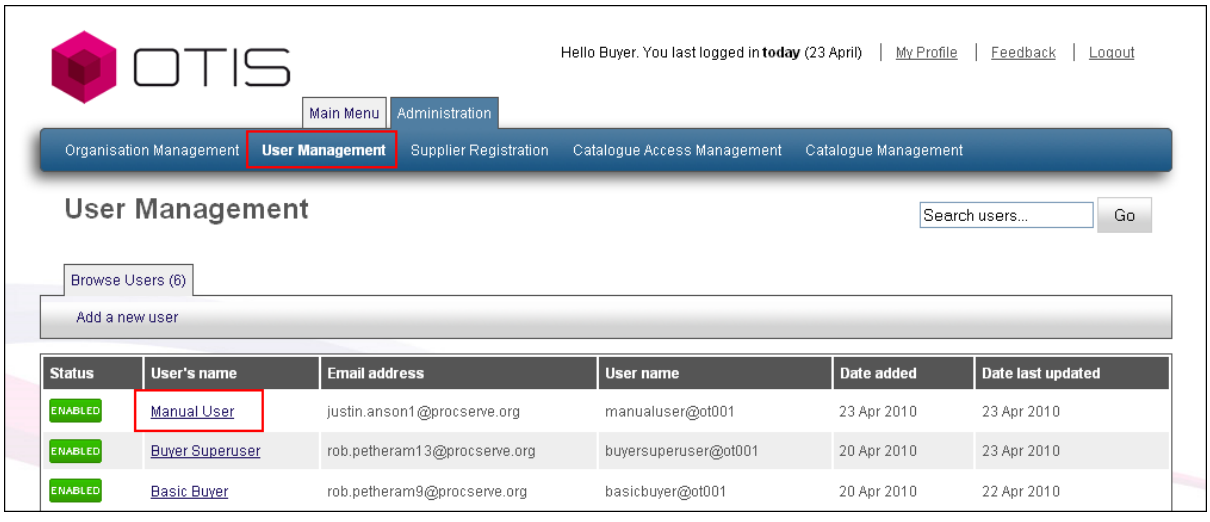
2. Click on 'User Management'

3. Click on the user you wish to edit the roles for



4. Click on 'Roles' to edit their roles in the organisation

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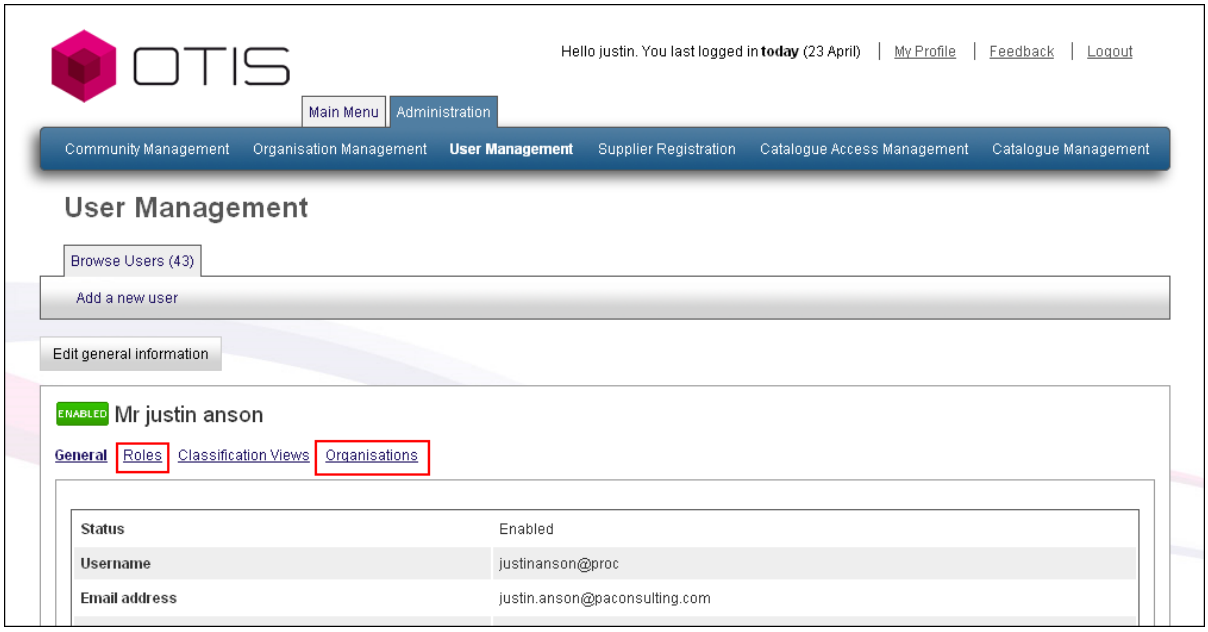

5. Enable and disable roles as required by clicking the 'Enable role' or 'Disable role' button as necessary.You should add the roles of

Buyer Administrator plus Buyer Report

or

Basic Buyer plus Buyer Reporter.

Note: There is no need to save any changes but the user will have to re-log in for the changes to take effect.

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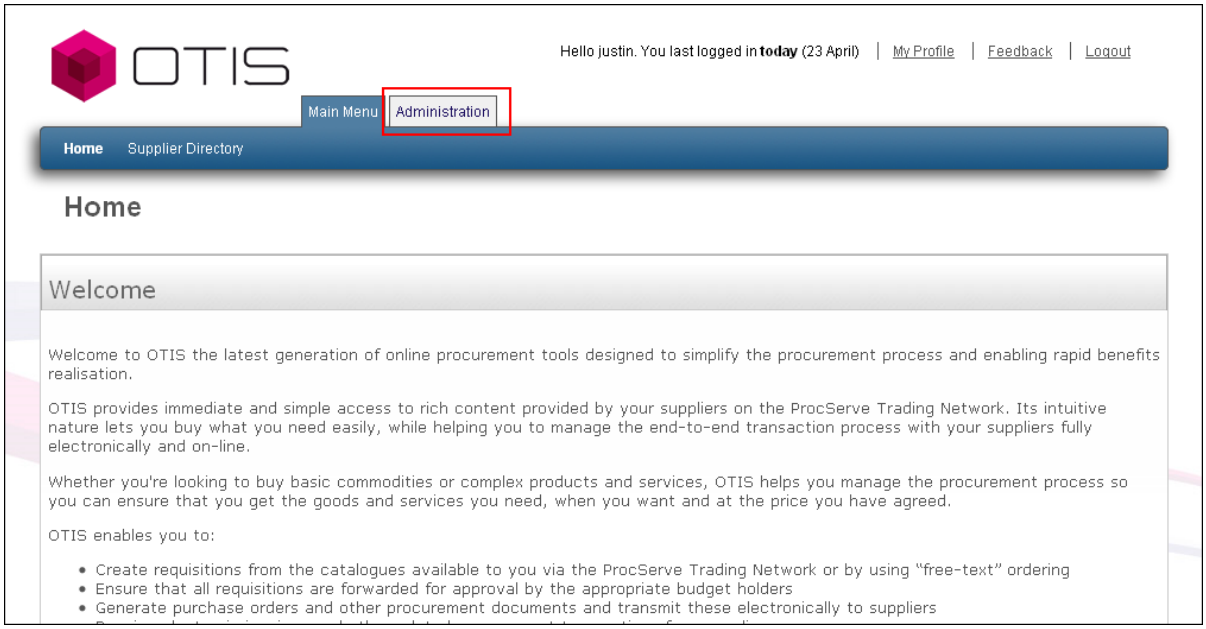
2.3.4.4 Deactivating and Activating a User

Overview

You can deactivate and activate a user in User Management.

To deactivate/activate a user

1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
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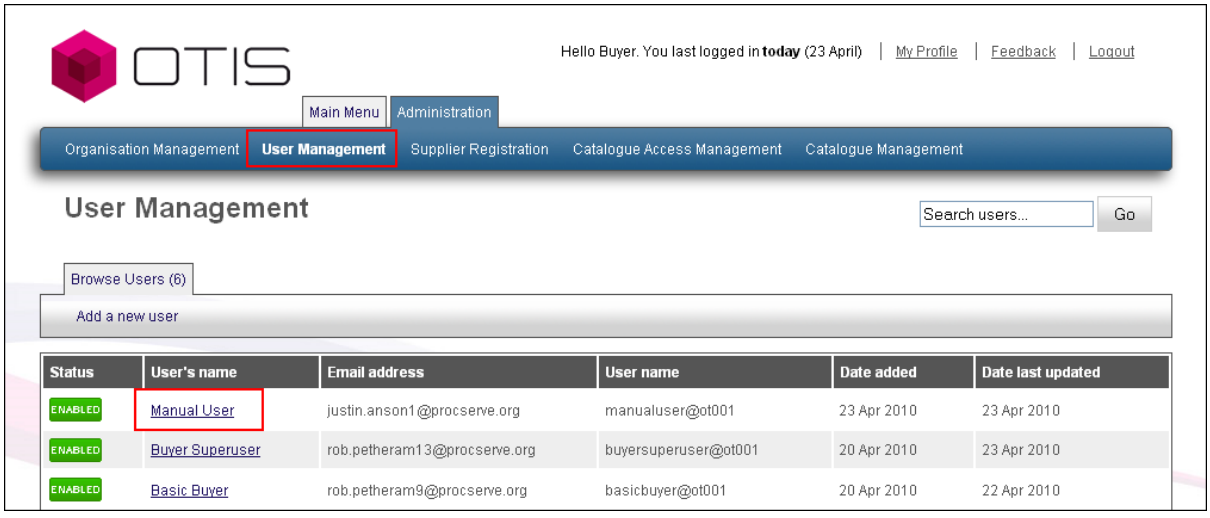
2. Click on 'User Management' and then the link of the user you wish to activate/deactivate



3. Click on 'Edit general information'

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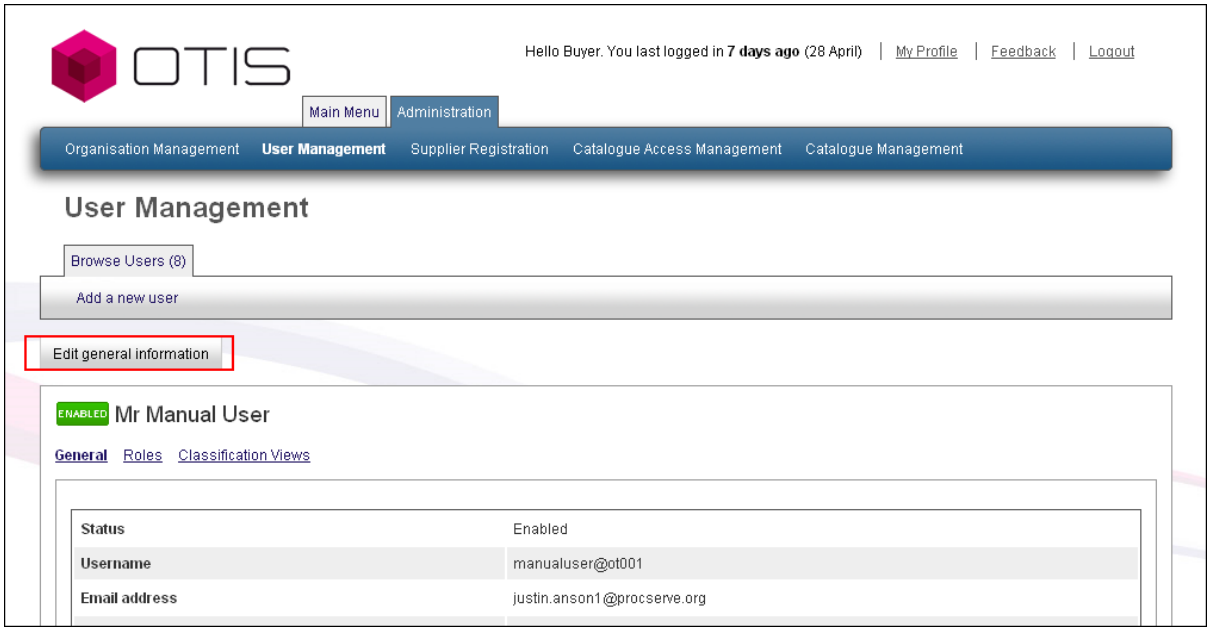
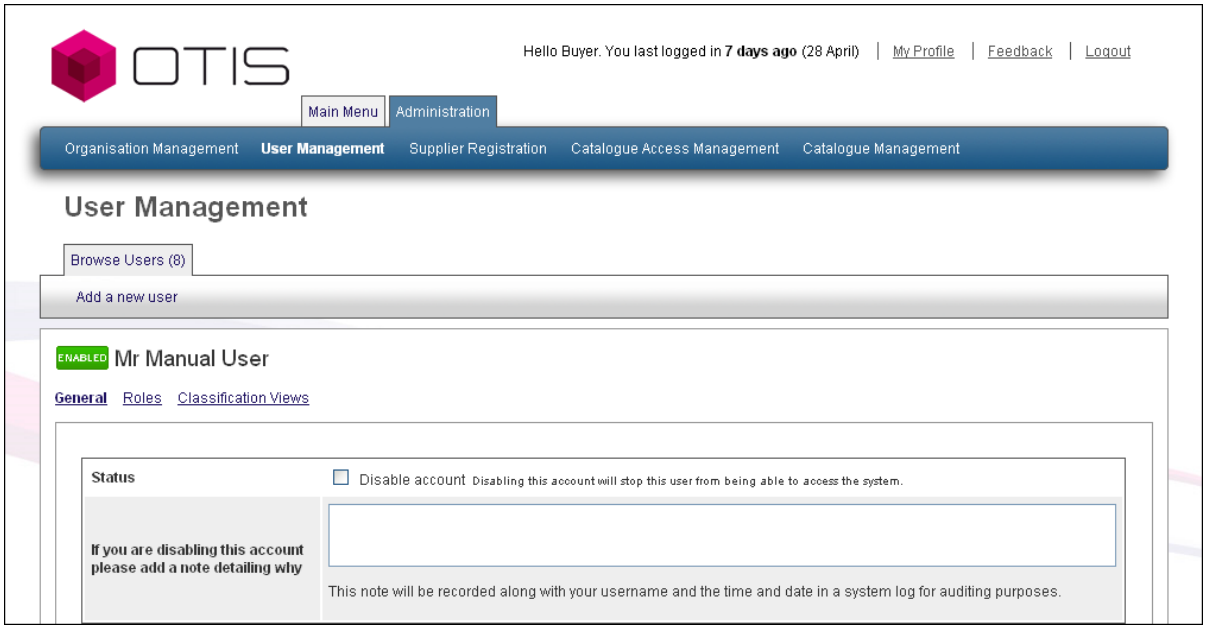


4. Tick the box to amend to the require status. Note: You will have to provide comments in the box to state why this action has been taken for audit purposes.


OTIS
Hello Buyer. You last logged in 7 days ago (28 April) | My Profile | Feedback | Logout
Main Menu
Administration
Organisation Management
User Management
Supplier Registration
Catalogue Access Management
Catalogue Management
User Management
Browse Users (8)
Add a new user
ENABLED
Mr Manual User
General
Roles
Classification Views
Status
Disable account
Disabling this account will stop this user from being able to access the system.
If you are disabling this account please add a note detailing why
This note will be recorded along with your username and the time and date in a system log for auditing purposes.

5. When complete click 'Save' at the footer of the page

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2.3.5 Administering xchangewales

2.3.5.1 Managing my Organisation

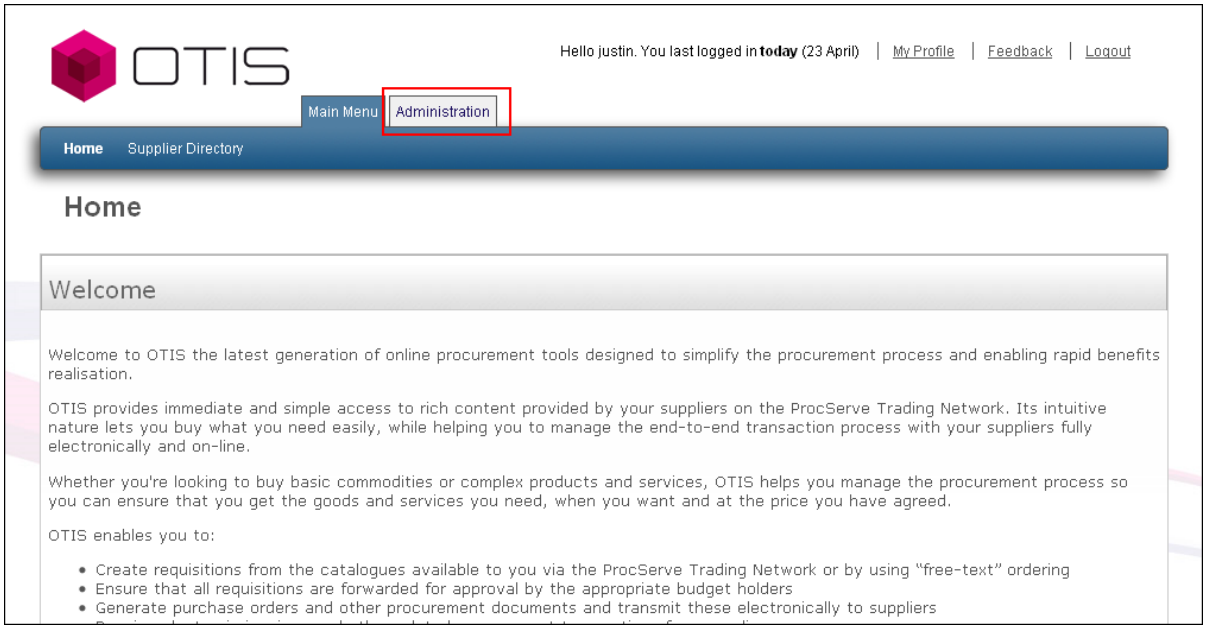
2.3.5.1.1 Editing the Organisation's General Details

Overview

You can view and edit the the general address details of your organisation in 'Organisation Management'.

Editing your Organisation's overview

1. Click on the 'Administration' tab


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
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Supplier Directory
Home
Welcome
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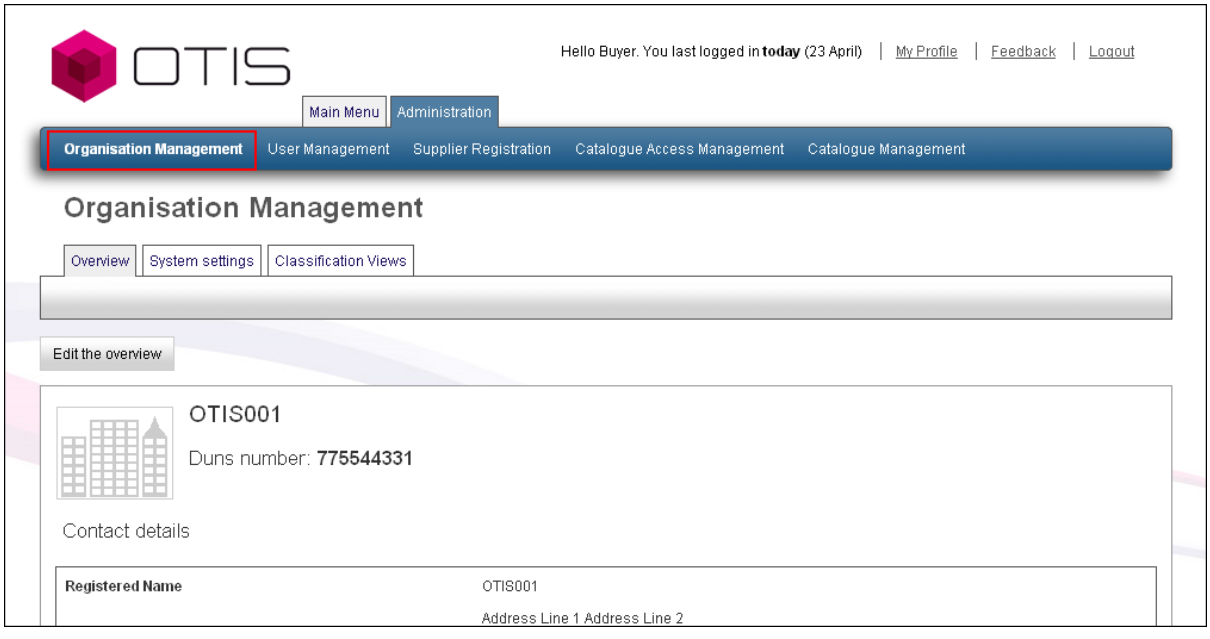
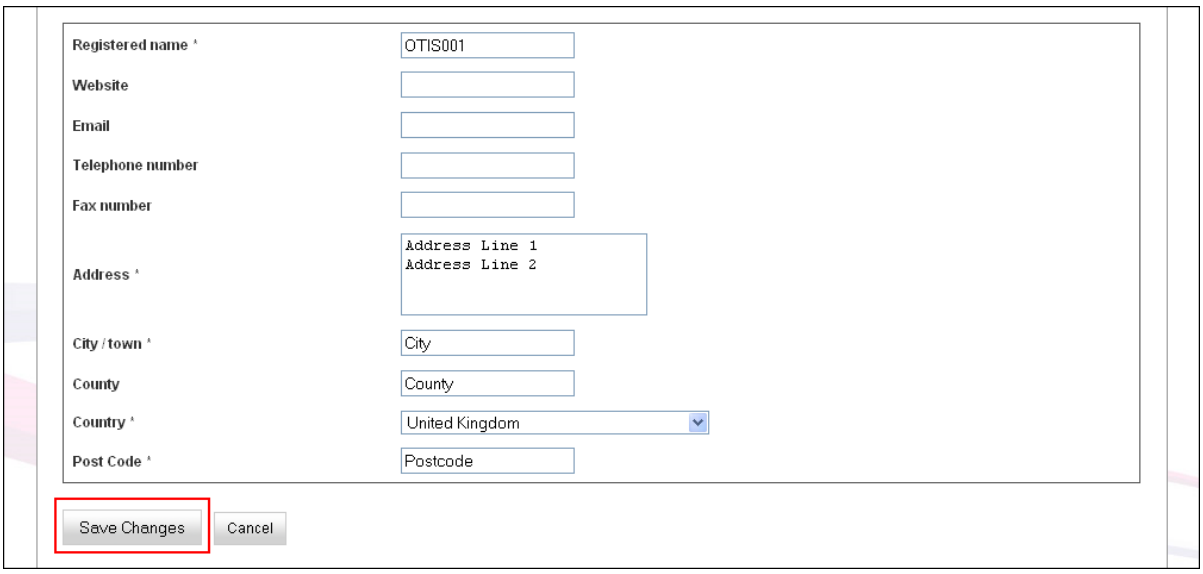
2. Click on 'Organisation Management'



3. To edit the details click 'Edit the overview'

4. Once complete click 'Save Changes'



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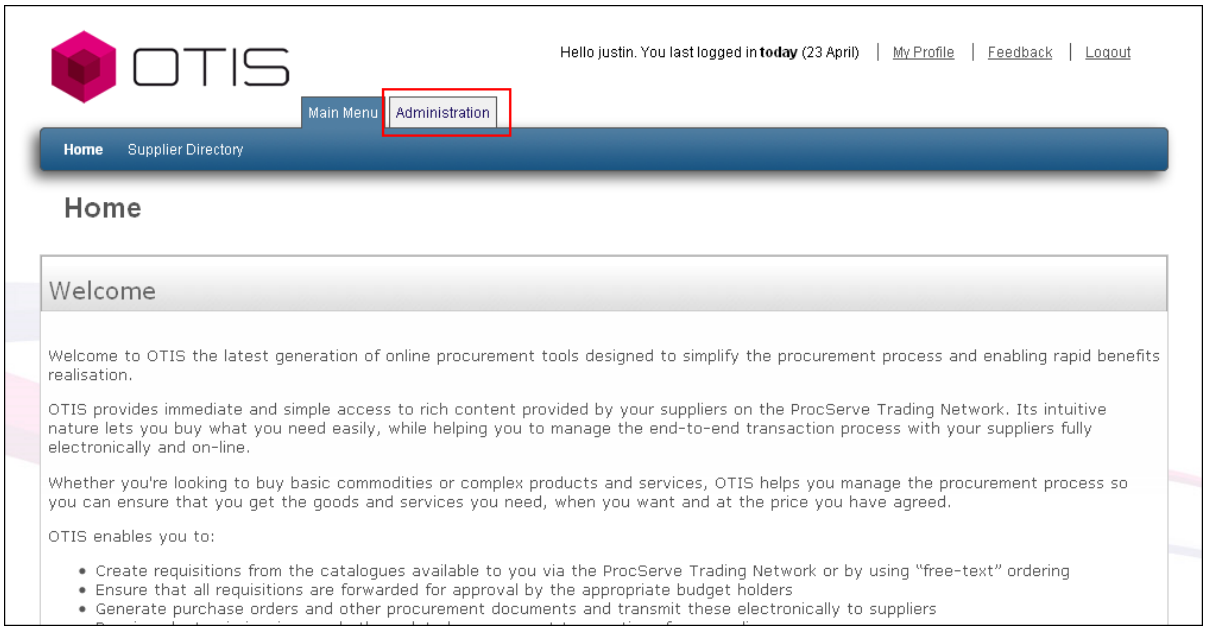
2.3.5.1.2 Editing the Organisation's System Details

Overview

You can edit your organisations system settings in 'Organisation Management' 'System Settings'

Editing your organisation's system settings

1. Click on the 'Administration' tab


OTIS
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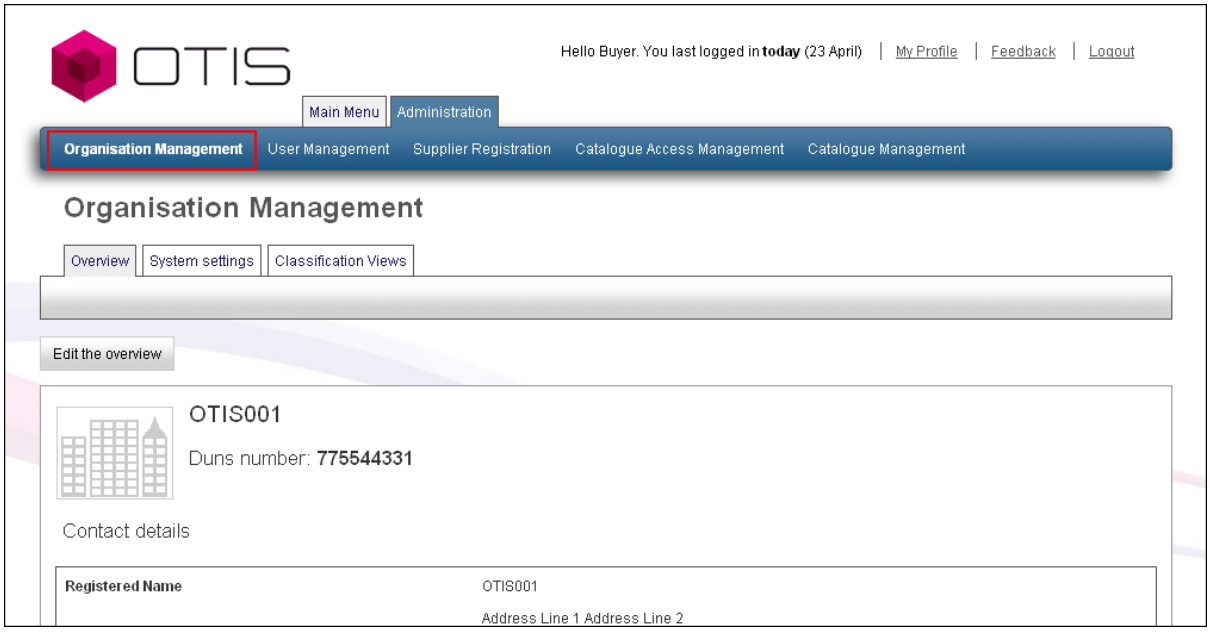
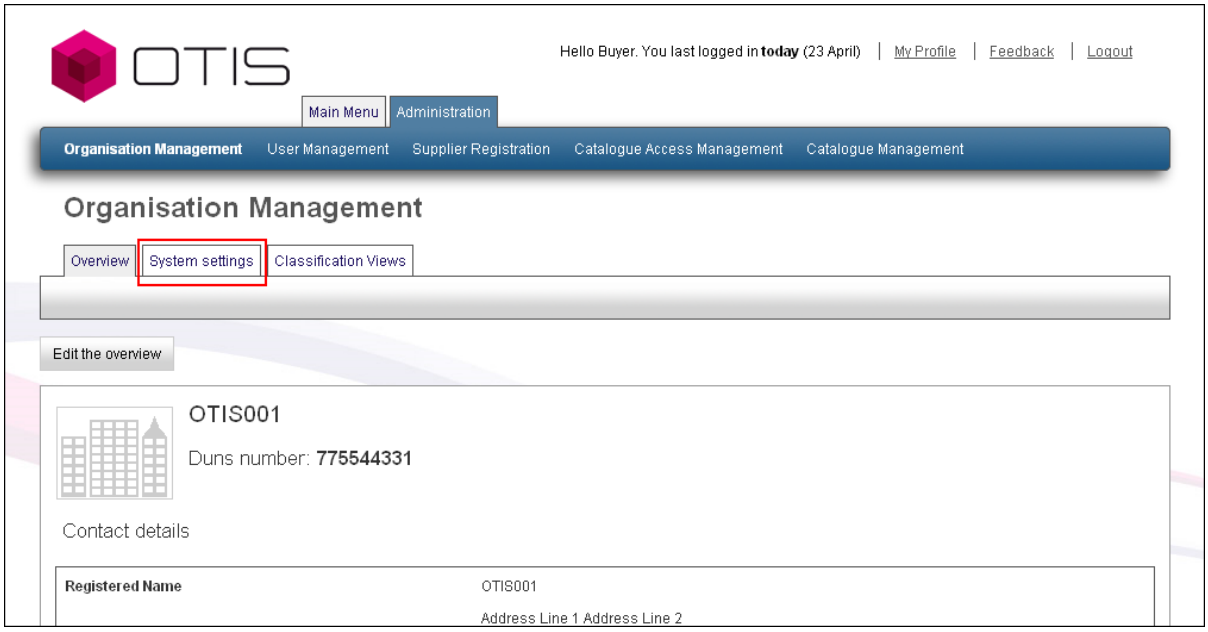
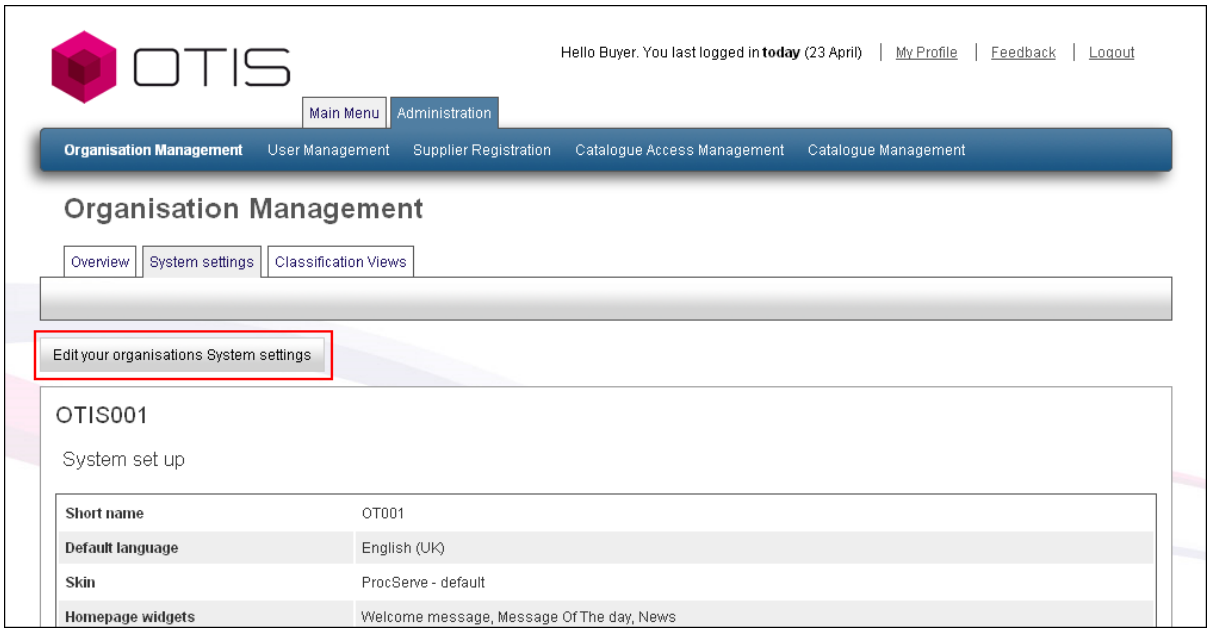
2. Click on 'Organisation Management'



3. Click on 'System Settings'



4. To edit the system settings click 'Edit your organisations system settings'



5. Once complete, click 'Save Changes'

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2.3.5.2 Managing Classification Views in xchangewales

2.3.5.2.1 Adding a New Classification View

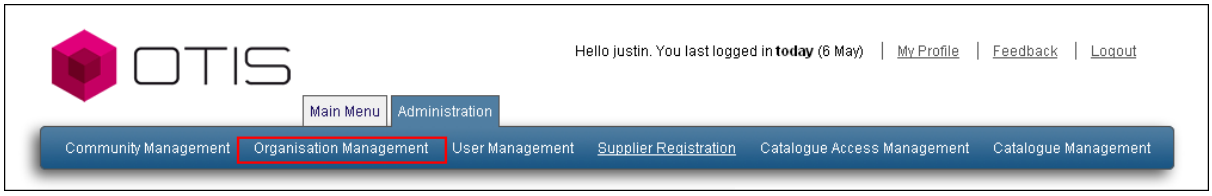
Note: Organisations who access the Marketplace via their P2P will continue to maintain Classification Views in the Catalogue Access Management.

To add a New View:

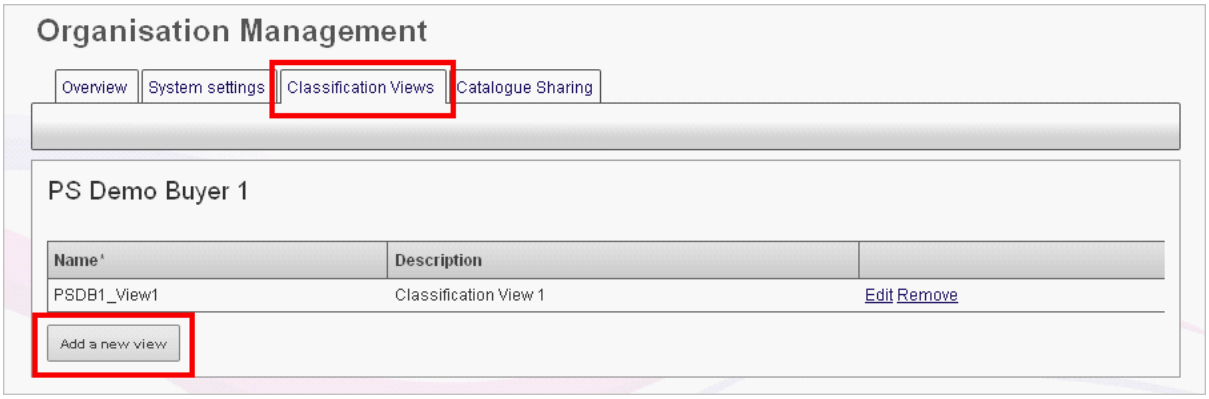
1. Login to xchangewales.

2. Click on 'Administration'

3. Click on 'Organisation Management'



4. Click on 'Add' a new view



5. Enter a View name and Description

6. Add catalogue(s) to the new view.

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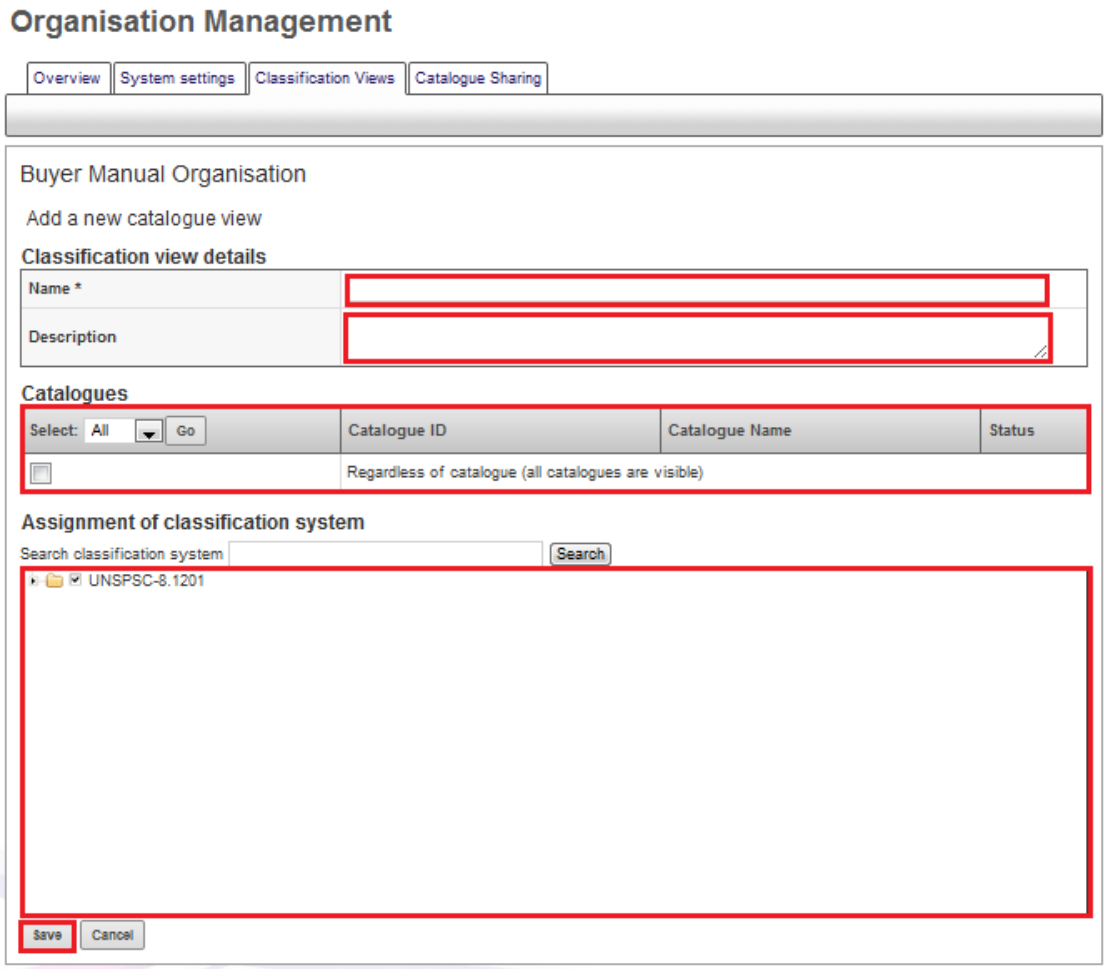

7. Once complete, click 'Save'.

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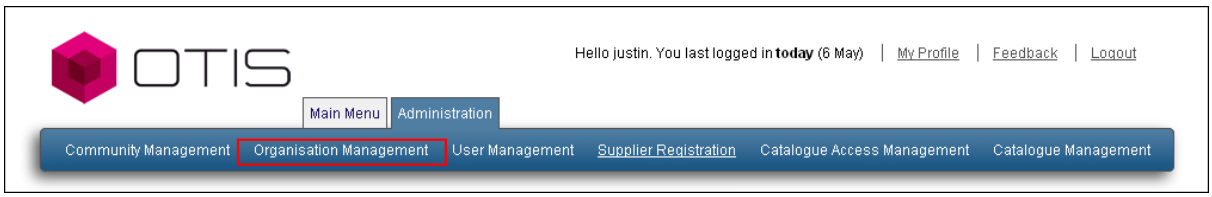
2.3.5.2.2 Editing a Classification View

1. Login to xchangewales.

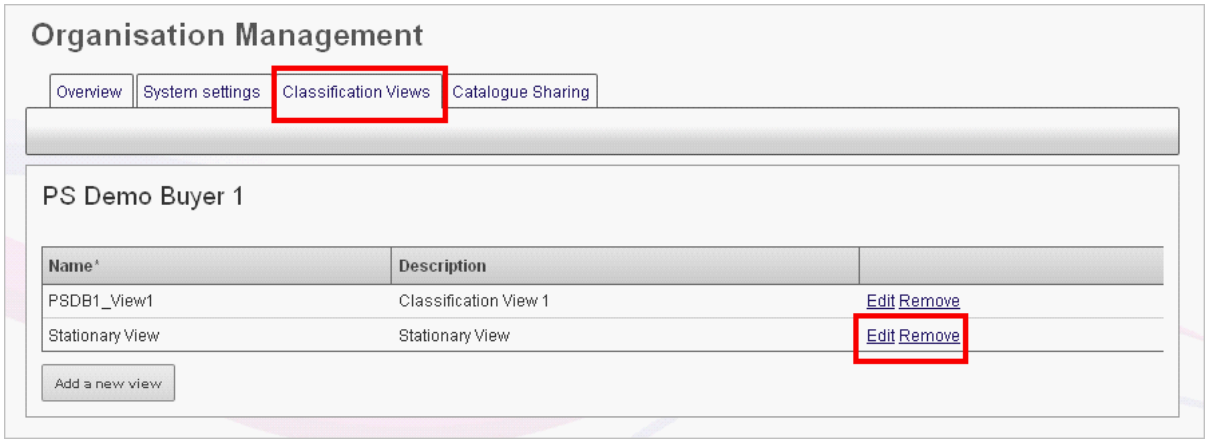
2. Click on 'Administration'

3. Click on 'Organisation Management'



4. Click on 'Classification Views'

5. Click on 'Edit' to edit the classification view



6. Make your changes

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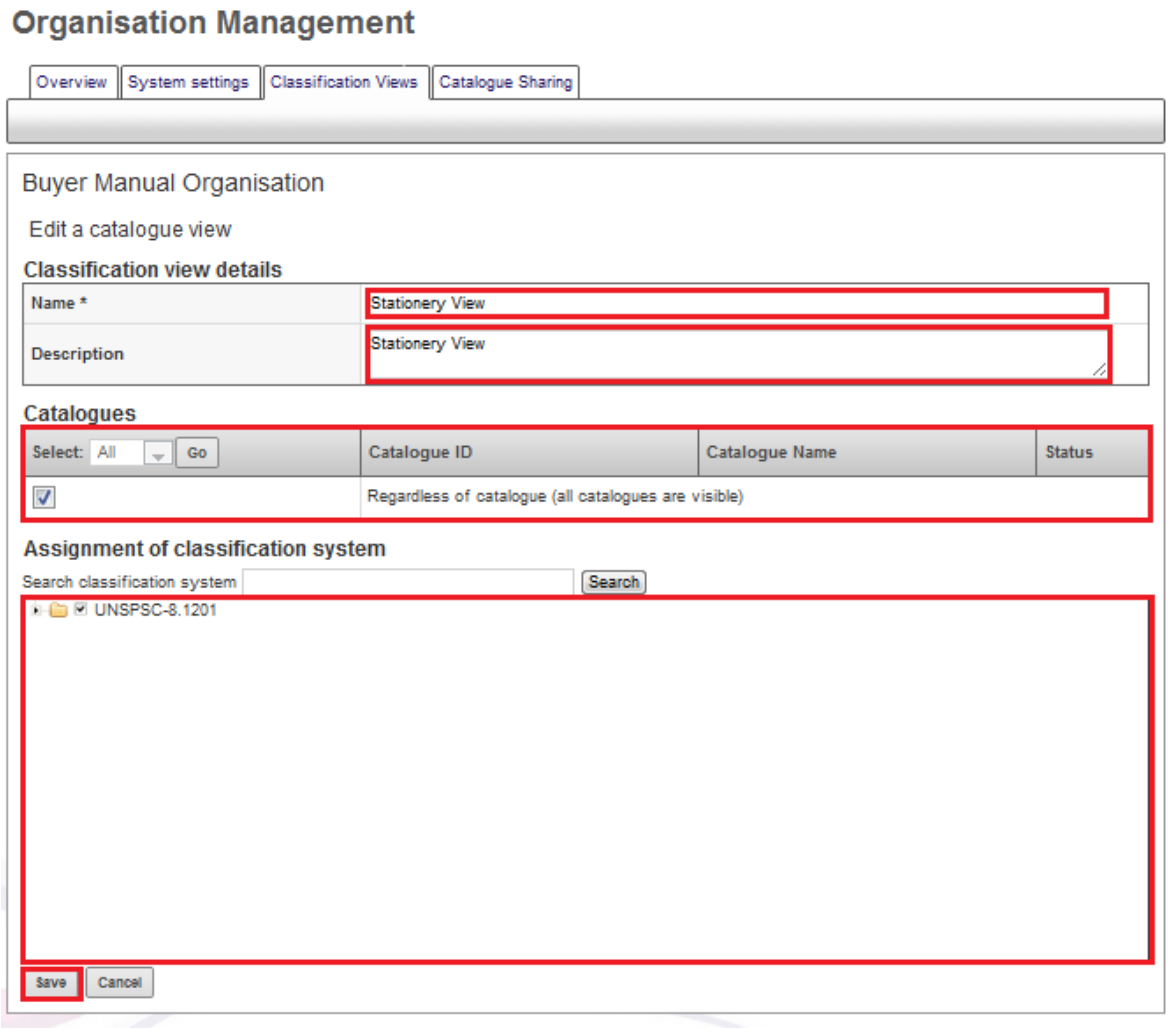

7. Click 'Save' once complete.

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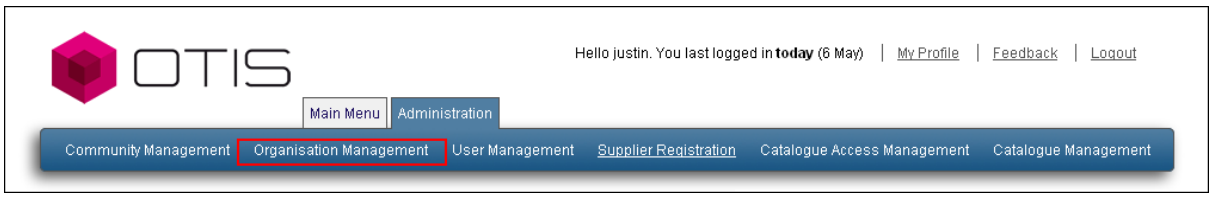
2.3.5.2.3 Removing a Classification View

1. Login to xchangewales.

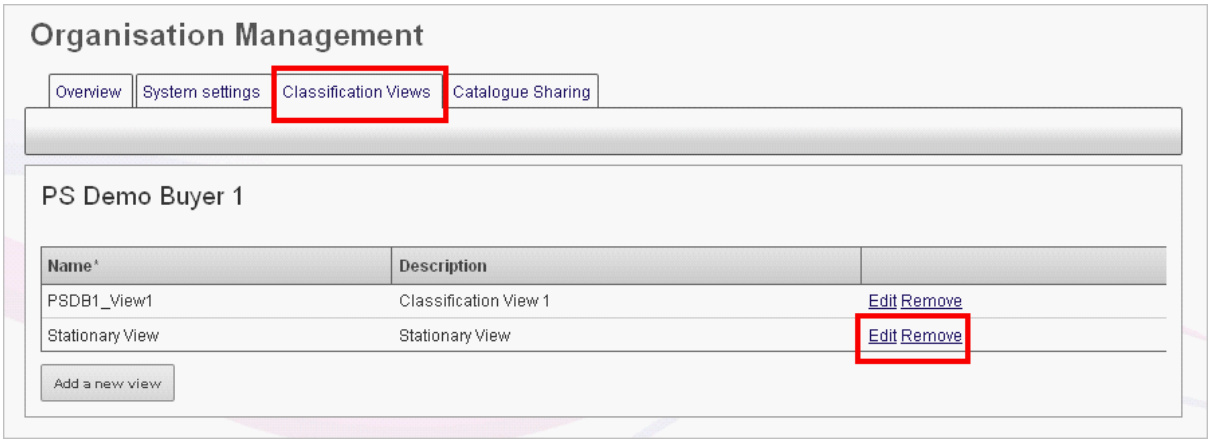
2. Click on 'Administration'

3. Click on 'Organisation Management'



4. Click on 'Classification Views'

5. Click on 'Remove'



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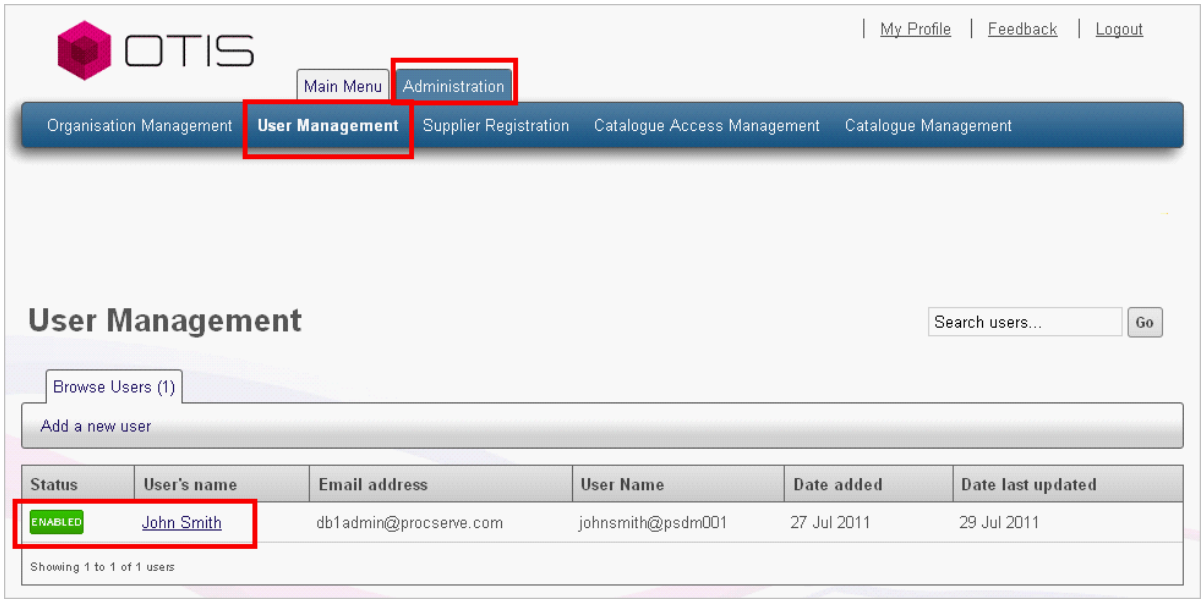
2.3.5.2.4 Add Classification Views to Users

1. Login to xchangewales.

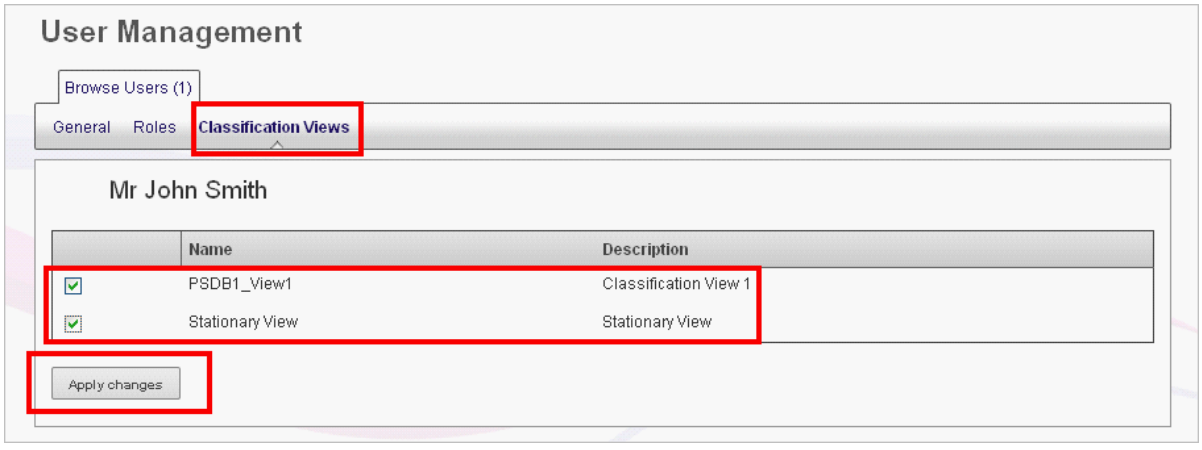
2. Click on 'Administration'

3. Click on User Management, search and select your user



4. Go to the Classification View Tab

5. Select the Classification View



6. Click on 'Apply Changes'

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3
Catalogue Shopping

3 Catalogue Shopping

3.1 Overview of Catalogue Searching

Overview

The search engine allows you to run to various types of search for items in the catalogues available to you. This section will provide you with a brief overview of how the search functionality works and give you some hints and tips on the best ways to use the search engine.

How does search work?

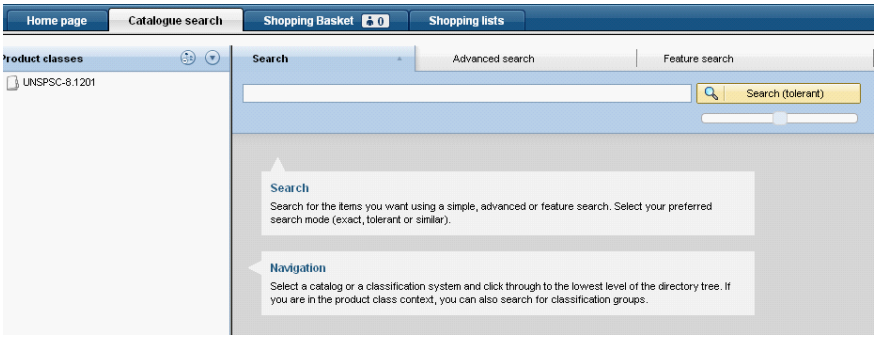
When a supplier creates a catalogue, they complete a template that mandates information put into key fields to fully describe the products or services that they provide. When you enter a search term, the search engine searches across some of these fields to ensure you return the best possible results.

The key fields that a supplier completes and the system searches across are:

- **Supplier Item Number**
- **Item Short Description**
- **Item Long Description**
- **Supplier Name**
- **Manufacturer Item Number**
- **Manufacturer Name**
- **Item Keywords**

When searching, the system allows you to adjust how the search works across the searchable fields by using the slider bar on the catalogues tab. Moving the slider bar will change how the system searches and will affect how many results are returned.

The slider bar has three settings and these are described below:


Home page
Catalogue search
Shopping Basket 0
Shopping lists
Product classes
UNSPSC-8.1201
Search
Advanced search
Feature search
Search (tolerant)
Search
Search for the items you want using a simple, advanced or feature search. Select your preferred search mode (exact, tolerant or similar).
Navigation
Select a catalog or a classification system and click through to the lowest level of the directory tree. If you are in the product class context, you can also search for classification groups.

Exact	The search details you type in the search field must exactly match what is in the catalogue
Tolerant	The system will allow for some minor discrepancies including some common spelling mistakes e.g. **recieved** will find **received**
Similar	The system will use a wider scope and broaden the search based on the

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	information you used in the search field. For example, if you searched for **towel** you could return **trowel**.

This table below shows what fields are searched and how they are searched based on which slider bar setting is selected:

Slider bar setting	Item Number	Short Description	Long Description	Keywords	Supplier Name	Manufacturer Item Number	Manufacturer Name
Exact	Equal	Contains	Contains	Not Used	Equal	Equal	Equal
Tolerant	Begins With	Tolerant	Tolerant	Contains	Contains	Begins With	Contains
Similar	Begins With	Similar	Similar	Similar	Contains	Begins With	Contains

When a search term is entered, the results may include where the word(s) appear in any order in:

- **A single field**
- **Across one or more fields** (e.g. one word in short description and one word in supplier name).

Using the System – Example

You would like to order some A4 Books. You decide to type A4 Book in the search field and click search. The system will perform a search for each word individually and return items where one of the words exists in one of the searchable fields.

Some typical examples of the types of results you can expect to see from this search are below with the words returned by the search in **bold**:

Supplier Part No.	Short Description	Long Description	Supplier Name	Keywords
Z1A223	**A4** Paper	A4 Reams Note Pad in various sizes	**Book** and Paper Co	Paper, Reams
086-961	Reading **Book**s	A5 & **A4** Reading **Book**s	Schools Supply Co	**Book**, reading, children
116-630	**A4** Writing Pads		Schools Supply Co	Pad, recycled, a4, **Book**
Q3T376	Address **Book**s	Hard Backed address book with tabs. Size **A4**	**Book** and Paper Co	
R5C945	**A4 Book**s	**A4** Size **Book**s	**Book** and Paper Co	

Other Ways of Searching - Exact Word and Wild Card Search

There are some additional elements of functionality that can be used to enhance the search process

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dependant on what you want to search for:

- **Exact Word Search:**

If you want to search for an exact word or words, you should place the word(s) in quotation marks. This will find the word(s) in the order entered within a single searchable field.
Using the same example as above, searching for "A4 Book" will bring back results from the highlighted columns as they are the only ones with the search term in a single field.

Supplier Part No.	Short Description	Long Description	Supplier Name	Keywords
Z1A223	**A4** Paper	A4 Reams Note Pad in various sizes	**Book** and Paper Co	Paper, Reams
086-961	Reading **Book**s	A5 & **A4** Reading **Book**s	Schools Supply Co	**Book**, reading, children
116-630	**A4** Writing Pads		Schools Supply Co	Pad, recycled, a4, **Book**
Q3T376	Address **Book**s	Hard Backed address book with tabs. Size **A4**	**Book** and Paper Co	
R5C945	**A4 Book**s	**A4** Size **Book**s	**Book** and Paper Co	

- **Wildcard Search:**

There are two variations on the wildcard search available to a user. A question mark is used to replace a single character and an asterisk is used to replace any number of characters.

Question Mark (?)
Use this to replace a single character within a search. Searching for **wh?te** will return results such as **white** and **whyte.**

Asterisk (*)
Use this to replace a string of letters either at the end or beginning of a word. Searching for **ave*** will return results such as **Ave**ry Labels**, ave**rage contents and winged **ave**nger. Searching for ***ave** will return results such as W**ave** Pens, Super S**ave** Ltd and r**ave** reviews.

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3.2 How to Search

Overview – How To Search

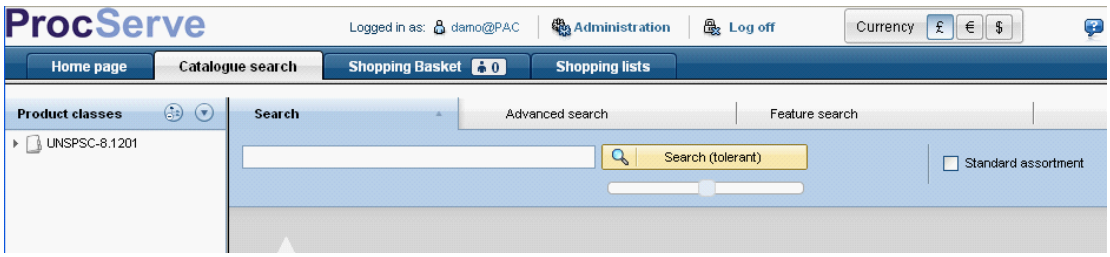
This section shows you the various ways to use the search functionality.

Locating the catalogue search feature

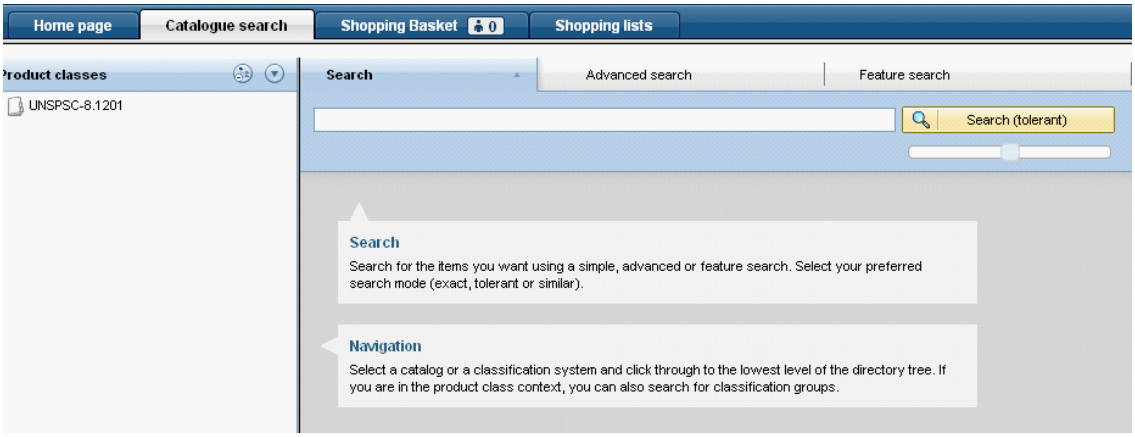
The following steps describe how you locate and use the catalogue search feature to create a requisition from a catalogue:

1. Punch-out from your P2P in to the Marketplace:

2. The catalogue is opened in a new window:
From here you can complete a simple keyword search in the search field.



3. Using the Search Features to find your items:
Click the catalogue search tab:


Home page
Catalogue search
Shopping Basket 0
Shopping lists
Product classes
UNSPSC-8.1201
Search
Advanced search
Feature search
Search (tolerant)
Search
Search for the items you want using a simple, advanced or feature search. Select your preferred search mode (exact, tolerant or similar).
Navigation
Select a catalog or a classification system and click through to the lowest level of the directory tree. If you are in the product class context, you can also search for classification groups.

The following list describes ways you can search:

Product Classes	You can use the UNSPSC tree to the left of the search page to navigate through the folder structure to a Product Class in order to return the items classified within that Product Class as shown below. **Note:** Only UNSPSC codes which you have access to will be displayed.

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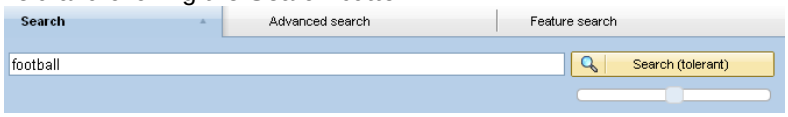
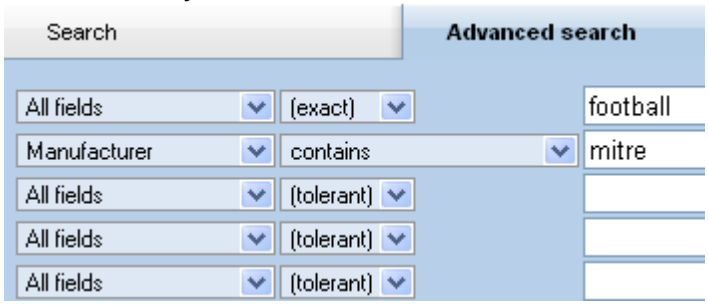
Search Tab	A simple search allows you to locate items by entering keywords in the Search field and clicking the Search button. 
Advanced Search	The Advanced Search allows you to search specific fields and with conditions. Click the Advanced Search tab to display the advanced search fields and build your search rules as shown below. 
Feature Search	The Feature Search allows you to filter items within your Search results that meet certain criteria. To perform a Feature Search you need to select the Feature Search tab and a Product Class from the left hand pane, before selecting from the drop down boxes the features that you wish your items returned to contain as shown below:

Tip: The catalogue and or UNSPSC code must be assigned correctly in the Classification Views for you to be able to find it.

Tip: When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC Tree Structure until the Search Index has been rebuilt. The Search Index is scheduled to run 23:00 daily. Once this is complete you can use the Search Tab to find items.

Tip: Only some catalogues will support feature search.

Tip: If you cannot found the items you wish to order - try the UNSPSC Tree search feature.

Tip: If you have too many items to work with you can filter your search using the Simple or Advanced Search features.

4. Filter on Search Results

When you search for a specific item, you will then see a filter option on the left hand side where there will be a number of options for you to choose from

Options include:

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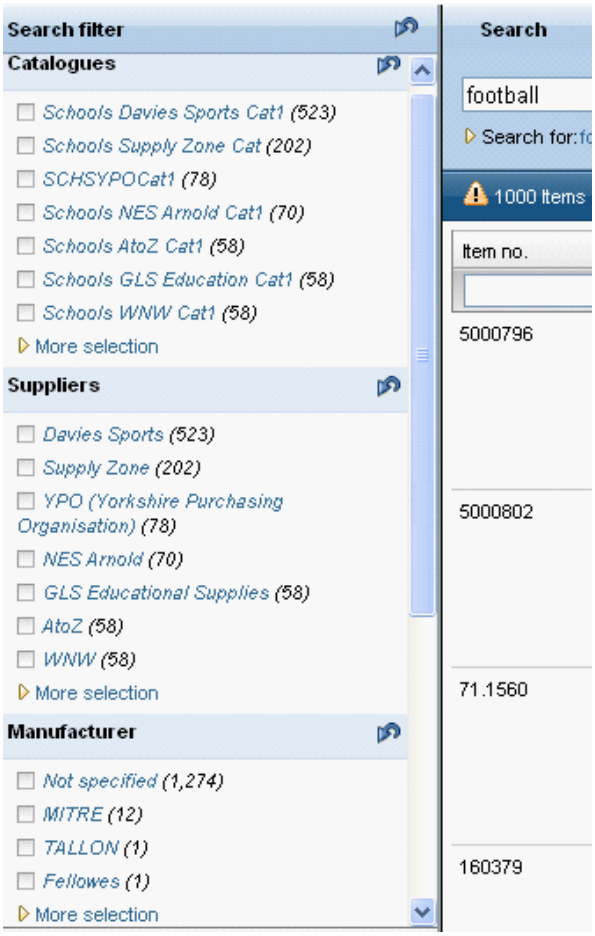
- **A breakdown of items per catalogue**
- **A breakdown of items per supplier**
- **A breakdown of items per Manufacturer**
- **A breakdown of items per Lead Time**
- **Product Classes**



If you tick on one of the options in the filter results, you will be presented with more item details and further breakdown of information from chosen supplier:

For more information see **'The Item Details Page'** section of this guide.

5. Working with the Search Results:

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Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later
Add to Comparison List		You can add all the checked items to a Comparison
Add to Favourites		You can add all the checked items to your Favourites List for future use
Add Selected Item(s) to cart		Check each item to be added and click the shopping cart icon

.

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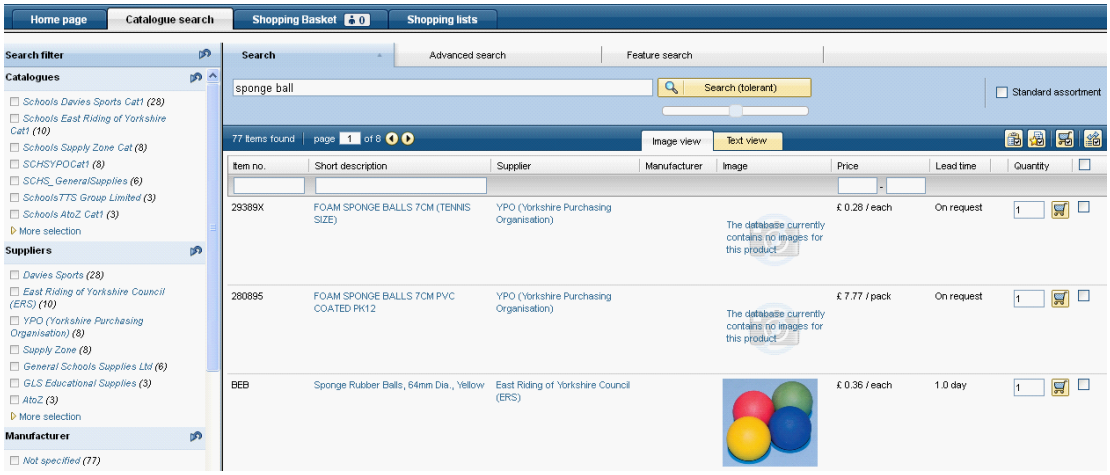
3.3 Examples of Searching

Here are some common examples of using the search system

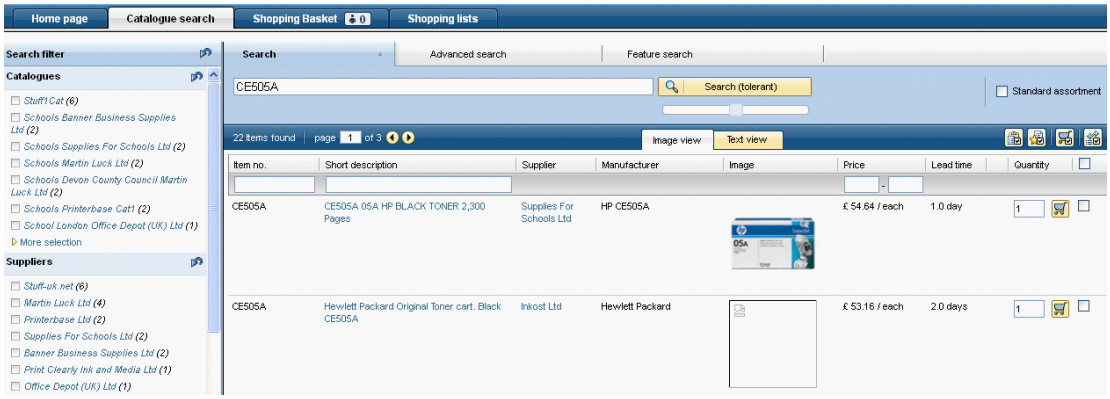
Q. I want to buy a sponge ball but am unsure exactly what type of sponge ball I want.

A. Try putting both words (sponge and ball) into the search box. Putting in just one of the words may make your search too wide.



Q. I need a toner cartridge for a HP LaserJet P2550d printer. The code on the cartridge is CE505A.

A. Try searching for the cartridge model number (CE505A). Put CE505A in the search field and this will return results with the product code anywhere within them.



Q. I want to buy some AA batteries from my local supplier Hills Components Limited.

A. You could try putting AA into the search field. This however would bring back too many results as the search term entered is too vague. You could try adding additional words to the search such as battery but this would also bring back items from suppliers you are not interested in.

To get a precise return, use the advanced search functionality. Put the words Hills and AA as shown in the example below making sure each term searches on the correct field.

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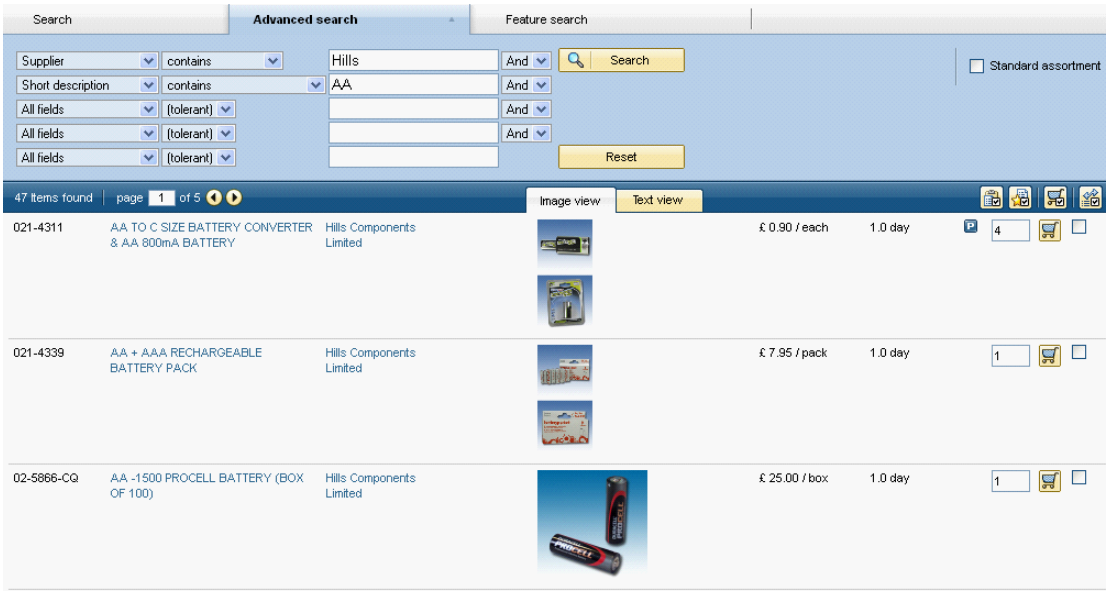
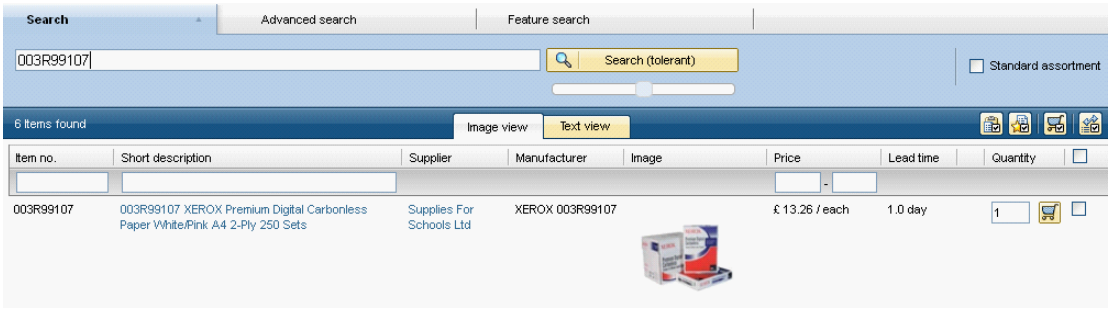


Q. I have been asked to get some carbonless 2 ply paper in white/pink. I have been given the product code from the supplier's catalogue but have not been told the suppliers name.

A. Enter the product code into the search field. If the supplier has a catalogue on the system then the item will be returned.



Q. I need to find the price on an anemometer but am unsure how it has been spelt by the supplier.

A. Try searching using the beginning of the word then using the wildcard search tool. Put anem* into the search field. If this brings back too many results then consider adding extra letters to your search. This example will bring back items with the letters anem at the beginning of a word in the item data.

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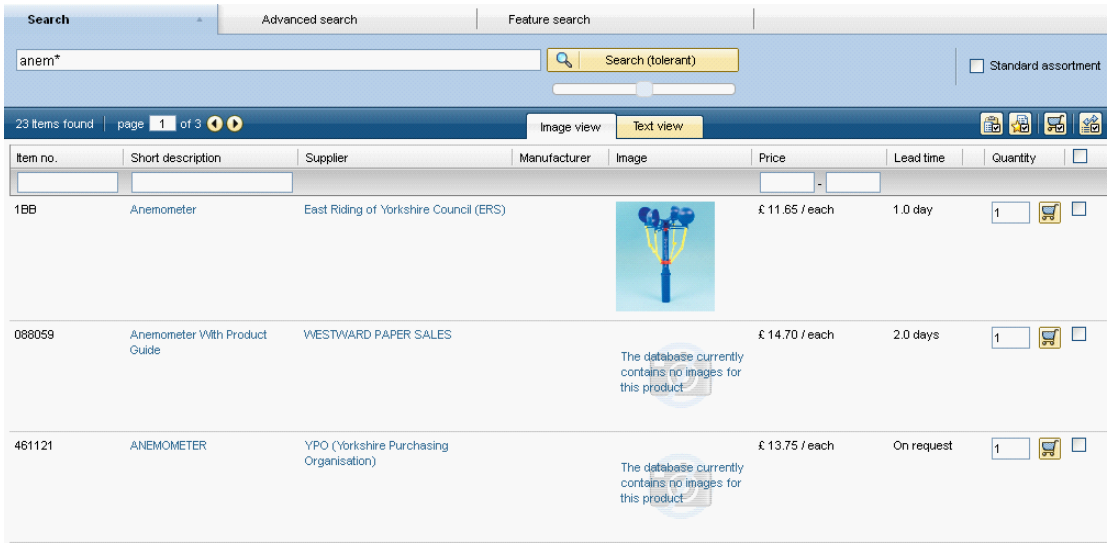

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3.4 The Items Details Page

Overview

This section describes how to use the Item Details page.

The Item Details page provides you with a detailed description of an item and a list of related items you may wish to consider.

Locating the Item Details Page

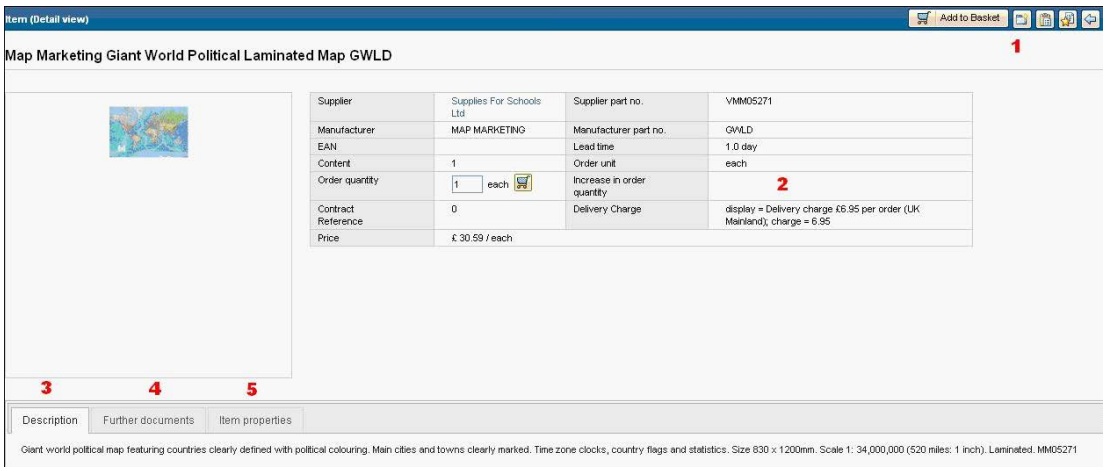
The Item Details page is accessed from:

• **The Shopping Cart**. In the shopping cart click the short description to display item details in a popup window.

• **The Search Results List**. In the Search Results area click the short description to display item details in the Search Results area.

About the Item Details Page

The following image is an example of the Item Details page from an item in the Search area. The three numbered areas are (1) Action Icons; (2) Item Details; and (3) Associated Items. These are shown in greater detail below:



The following list describes the major features of Items details page:

(1) Action Icons: These icons are not displayed if the item is already in your Shopping Cart:

Add Item to Basket		Click to add item to your Shopping Basket
Open Items Details		Click to view item details in new window
Add to Favourites		Click to add item to your Favourites List
Add to Shopping List		Click to add item to your Shopping List
Return to Search Page		Click to return to Search Page

(2) Item Details: A summary of the item details. To view any associated documents click on any link in the Further Documents field.

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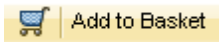
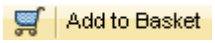
Add to Shopping Cart		Click to add item to your Shopping Basket

Note: In the Shopping Cart item details pop-up you cannot change the quantity.

(3) Description: This gives a more detailed description of the item.

(4) Further Documents: This may include additional images

(5) Item Properties: This may include further details of item

Add to Basket		Click to add item to your Shopping Basket

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3.5 Comparing Items

Overview

This section describes how to compare items. You can build a list of items to be compared and compare one of the items against the others.

Building the Compare Item List

The following steps describes how you can add items to and use the Comparison List:

1. Locate the items you are considering purchasing.

2. Mark the items you wish to compare by selecting the right check box for each item:
For example:

3. Add Selected Items.

Click the Add Selected Items icon. Items details are listed in the Compare Items window:

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	Compare with this column	Compare with this column
Short description	**Map Marketing World Political Laminated Map BEX**	**Map Marketing Giant World Political Laminated Map GWLD**
Price	£ 17.95 / each	£ 30.59 / each
Supplier	Supplies For Schools Ltd	Supplies For Schools Ltd
Supplier part no.	VMM30001	VMM05271
Manufacturer	MAP MARKETING	MAP MARKETING
Manufacturer part no.	BEX	GWLD
EAN		
Content/Order unit	1 / each	1 / each
Lead time	1.0 day	1.0 day
Description	Bartholomew Executive World Map. Laminated map that shows countries clearly defined with political colouring. Main cities and towns are clearly marked along with time-zone clocks. Size 37x59 MM30001	Giant world political map featuring countries clearly defined with political colouring. Main cities and towns clearly marked. Time zone clocks, country flags and statistics. Size 830 x 1200mm. Scale 1: 34,000,000 (520 miles: 1 inch). Laminated. MM05271
Unit of Purchase Quantity	1	1
Image		
Further documents	Item Information URL	Item Information URL

Tip: If you want to compare items on several different pages of the comparison list, you must click on before you go to the next page otherwise your selection will be lost. The comparison list will be retained if you close the window with or if you use the search function to create a new item list. You can open the comparison window again by clicking on .

4. Using the Compare Items List:

Compare with This Column Check Box. Check this box to highlight differences between this item and all other items.

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	Compare with this column	Compare with this column
Short description	**Map Marketing World Political Laminated Map BEX**	**Map Marketing Giant World Political Laminated Map GWLD**
Price	£ 17.95 / each	£ 30.59 / each
Supplier	Supplies For Schools Ltd	Supplies For Schools Ltd
Supplier part no.	VMM30001	VMM05271
Manufacturer	MAP MARKETING	MAP MARKETING
Manufacturer part no.	BEX	GWLD
EAN		
Content/Order unit	1 / each	1 / each
Lead time	1.0 day	1.0 day
Description	Bartholomew Executive World Map. Laminated map that shows countries clearly defined with political colouring. Main cities and towns are clearly marked along with time-zone clocks. Size 37x59 MM30001	Giant world political map featuring countries clearly defined with political colouring. Main cities and towns clearly marked. Time zone clocks, country flags and statistics. Size 830 x 1200mm. Scale 1: 34,000,000 (520 miles: 1 inch). Laminated. MM05271
Unit of Purchase Quantity	1	1
Image		
Further documents	Item Information URL	Item Information URL

5. Differences are highlighted as shown in the above image.

6. On the Compare Page you can:

Remove Item		Click the Remove Icon to remove the relevant item from the Comparison List.
Add to Cart		Click the Add to Cart icon to add the relevant item to your shopping cart.
Empty Compare List		Click this icon to close the Comparison window and empty the Comparison List.

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3.6 Smart Forms

Overview

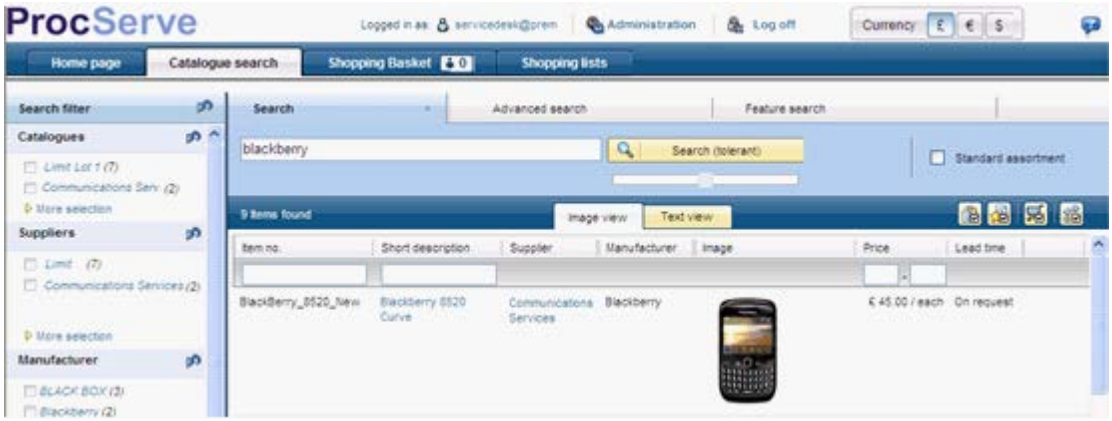
This section describes Smart Forms and how to use them.

What is a Smart Form?

A Smart Form is used in certain catalogues to capture additional information that is typically unique to the particular purchase. Smart Forms enable the supplier to create user defined fields which can be either free text or drop down lists. Each field can be specified as either mandatory or optional with those fields that are mandatory needing to be completed before you can check out.

Completing the Smart Form?

The Smart Form is contained within the items details of the line item.



1. Clicking the link of an item will take you in to the details

2. The Smart Form details can then be completed as required

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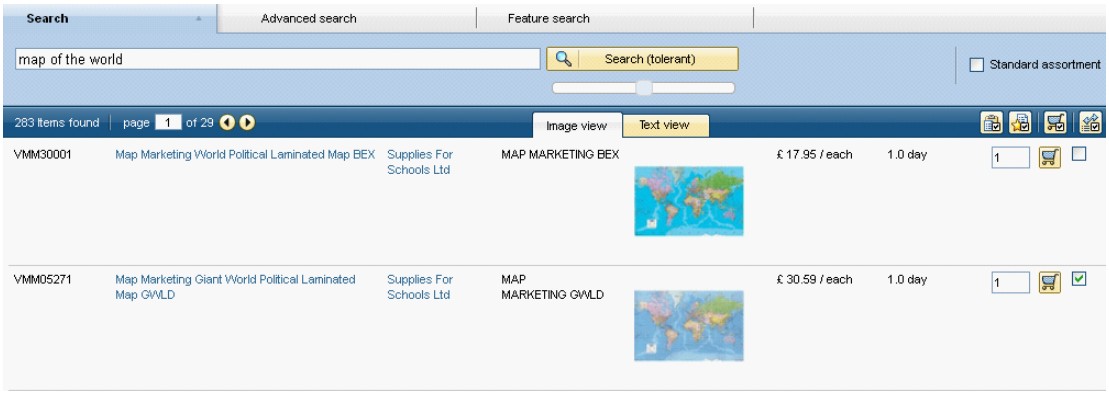
3.7 Adding Items to your Shopping Cart

Overview

This section describes how you add items to your Shopping Basket and manage your shopping cart.

1. Adding Items to your Cart:

Having found the item or items you wish to add to your requisition in the Search page you can now add them to your cart:



2. If required you can change the quantity and check the box in the right hand column:

If you only require this item then you can add item to shopping basket by clicking on the Shopping Basket icon

, or if more than one item is ticked on you can click on the Add Selected Items To Shopping Basket Tab

.

If you want to continue shopping, you can simply search for another item and repeat above process.

3. When you add items to your shopping cart the shopping cart tab will flash for a short while and will be updated with the number of items you added:

For example if you added an item to your shopping cart that already had an item in it the new total will be two:

4. Reviewing Shopping Cart:

You can review and update your shopping cart and when you are satisfied with the items send the requisition. At any time during shopping you can click the shopping cart tab to view the contents:

The shopping cart contains the items you have selected for your requisition. You can continue shopping by clicking the catalogue search tab at any time.

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You can add or remove items from your cart, change quantities or cancel the purchase.

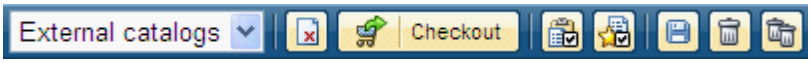
Also note that delivery charge if applicable, will be included in the shopping basket tab

The table below highlights the additional options available to you when working with the Shopping Cart:

External Catalogues		You can punch out to an external catalogue.
Items		You can click on the Short Description to view a more detailed description of the item.
Cancel Purchase		To cancel the purchase, click the Cancel Purchase icon.
Save Changes		You can make changes to the items in the cart. For example: change quantities. Click the Save Changes icon to save your changes.
Delete Selected Items		Click this item to delete all items that have their right column boxes checked. A prompt is displayed. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Delete All Items		Click this item to delete all items in the cart. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later.
Add to Favourites		You can add all the checked items to your Favourites List for future use.

6. Checkout:

When you have checked that the items you wish to order are OK you are ready to click the checkout button.



Note: The order will not be sent to the supplier until your requisition has been approved.

Note: Shopping Basket Caching - Unless you cancel the purchase or checkout, your basket and its items will be cached. So the next time you log in to the Marketplace, your items will still be in your basket.

7. If your Checkout is successful:
You will be redirected to your P2P or back office system.

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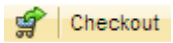
3.8 Working with your Shopping Cart

Overview

You can make changes to your cart, cancel the purchase or send the requisitions using the cart. The following list provides a description of the components of the shopping cart:

External Catalogues		You can punch out to an external catalogue.
Items		You can click on the Short Description to view a more detailed description of the item.
Cancel Purchase		To cancel the purchase click the Cancel Purchase icon.
Add Multiple Item(s) to cart		Check each item to be added and click the multiple shopping cart icon.
Save Changes		You can make changes to the items in the cart. For example: change quantities. Click the Save Changes icon to save your changes.
Delete Selected Items		Click this item to delete all items that have their right column boxes checked. A prompt is displayed. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Delete All Items		Click this item to delete all items in the cart. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later.
Add to Favourites		You can add all the checked items to your Favourites List for future use.
Checkout		Click this icon when you are ready to send the requisition. The requisition will now be available for the authoriser to import into your back office for approval

You may also notice a number of icons next to specific items. These are used by suppliers, where relevant, to enhance specific items:

The following is a guide to icons you may see on the marketplace:

Central Hub Item		Content from this icon is from Mandated Contracts. UK Public Sector Organisations only.
Collaborative-Content		Item is part of Collaborative Contract or Framework Agreement

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Core-Item		Core-Item within a contract
Environmentally-Friendly		Items showing this icon are recyclable, bio-degradable, carbon neutral or otherwise Environmentally Friendly.
Hazardous-Item		Items displaying this icon are Hazardous Materials (HazMat).
Price-Break		Price Breaks occur when you receive a discount for buying larger quantities of this item.
Required Associated Item(s)		A Required Associated Item(s) is an item which MUST be purchased if the original item is purchased.
Optional Associated Item(s)		Optional Associated Item(s) are not automatically added to shopping basket.

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3.9 Working with Favourites

Overview

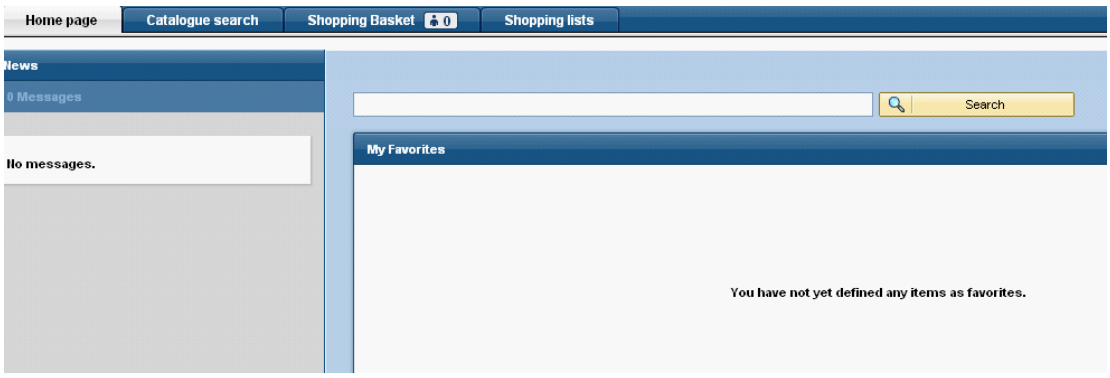
This section describes how to work with your favourite items.
Your Favourite items are available as a list on your Home page. You use favourites to add items you order frequently.

Adding to Favourites

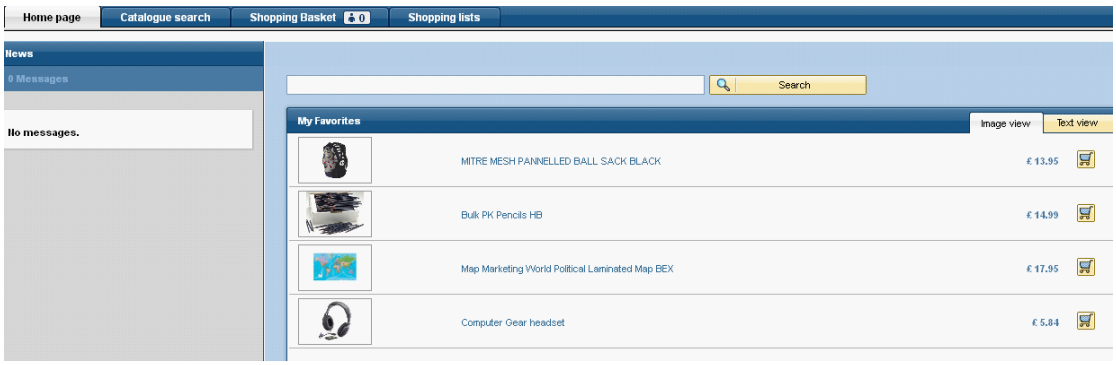
The following steps describe how you add and work with favourites:

1. You can add to your favourites whenever you see this icon:

2. The Home Page Favourites List
Favourites are shown on the landing page of the ProcServe Catalogue System.



The Home Page will always display **You have not yet defined any items as your favourites** until an item is added:



3. The following describes how you work with the Home Page Favourites List:

• **Image View and Text View**. You can switch between a view that includes the item images and a text view. The image view is shown in the above image. Text view does not show any images:

Image View

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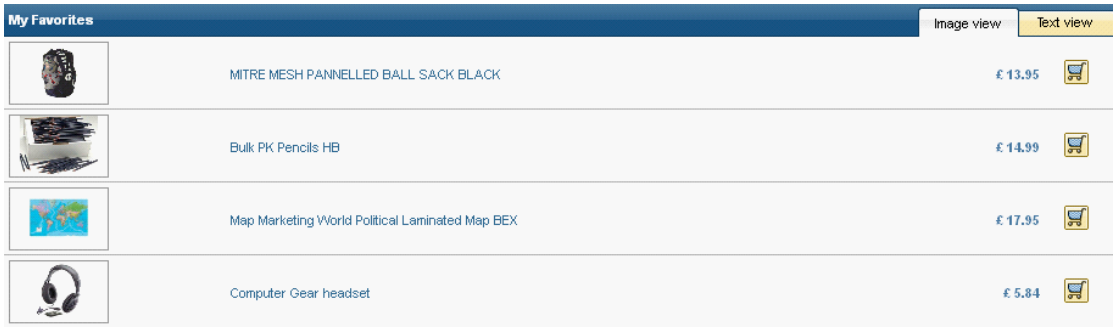
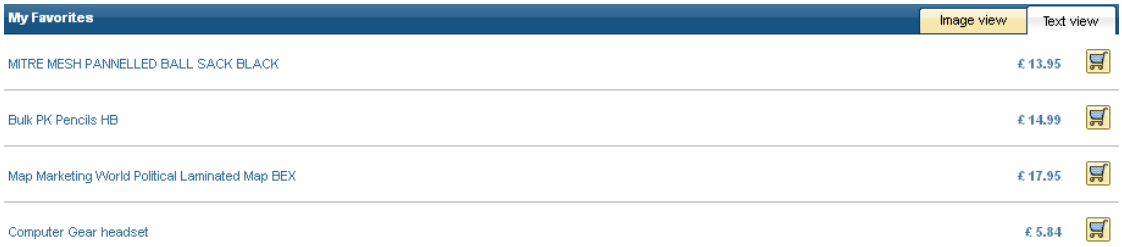
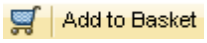


Text View



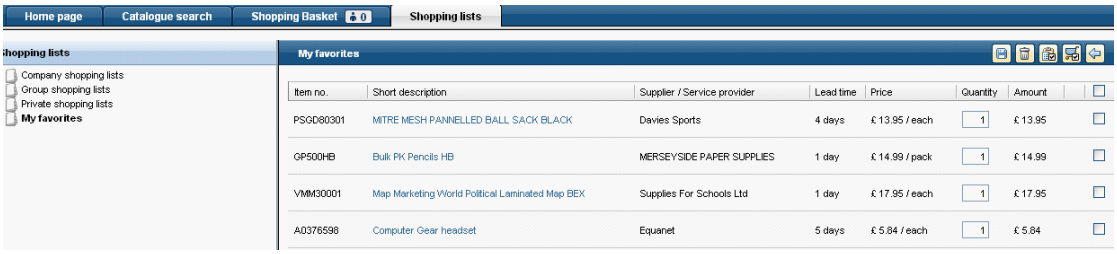
• **Item Details**. Click an Item description to view the Item details.

• **Add Item to Shopping Cart**. Click this icon 

to add the item to your Shopping Cart.

4. Working With Your Favourites List.
You can delete items, add multiple items to the Shopping Cart or add items to a Shopping List using the Favourites List within the Shopping Lists tab.

5. In the Catalogue navigate Shopping Lists >> My Favourites:



6. The following list describes how you work with the Favourites:

• **Update Quantity**. You can change the Quantity for an item and click the Save icon (see below). The new quantity is saved for later use. You can also update the quantity prior to adding to your Shopping Cart.

• **Mark Item**. To mark an item for deletion or adding to a Shopping List or cart you check the box in the right hand column. You can mark as many items as you like.

Save Changes		Save changes to your Favourites.
Delete Items		Delete items that have a Tick in the checkbox from your Favourites.
Add to Shopping List		You can add all the checked items to a Shopping List

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		which you can change and re-use later
Add Item(s) to Cart		Check each item to be added to your cart and click the multiple Shopping Cart icon

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3.10 Working with Shopping Lists

Overview

This section describes how to work with your Shopping Lists.

A Shopping List allows you to save items so that you can quickly create a requisition at a later date. For example, if you create a monthly artistic supplies requisition you can save all the items in a Shopping List, add to the shopping cart and then review and send the requisition.

Adding Items to Your Shopping Lists

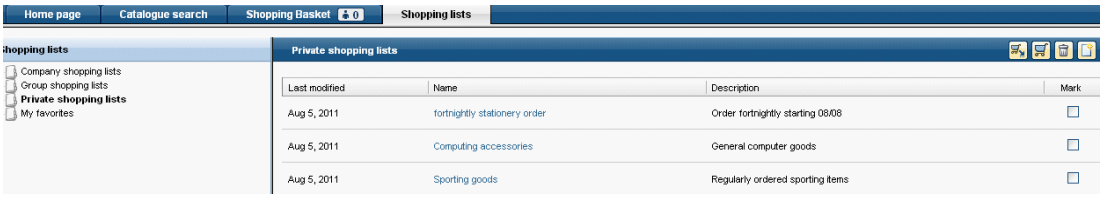
1. Whilst shopping you can add to your Shopping List by clicking this icon .

The following list describes how to use this page:

Create New Shopping List		To create a new Shopping List enter a name and description in the relevant fields. The new Shopping List is displayed.
Add to Shopping List		Add the items to the relevant Shopping List. The existing Shopping List is displayed with item(s) added.
Back Icon		Return to the previous page. Changes are not saved.

2. Locating your Shopping Lists:

Click Shopping Lists tab:



3. About the Shopping List Page.
The following list describes the Shopping List:

Company Shopping List	These are for use throughout the organisation. **Note**: Only catalogue administrators can create, edit and delete these lists.
Group Shopping List	These are for use by groups of users. **Note**: Only authorised employees can create and change these lists.
Private Shopping List	These are shopping lists you create for your own use. **Note**: Only you can create and change these lists.

4. Working with Shopping Lists.
The following list describes how you work with shopping lists:

Open Shopping List		You can click the Name link for a Shopping List to

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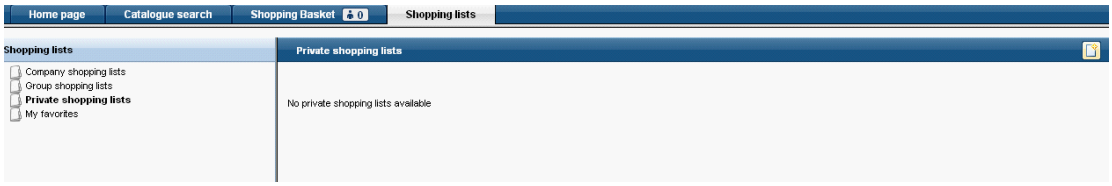
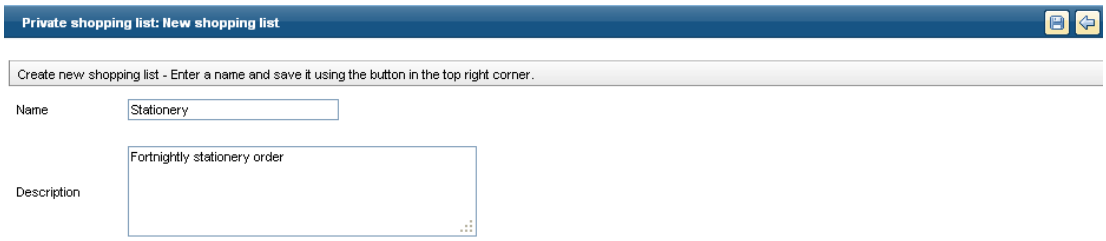
		display the items
Marking Shopping List		You mark an item by checking the relevant Mark box in the right hand column.
Replace Shopping Cart with Marked Items		Replace the entire Shopping Cart with all marked Shopping Lists.
Add Marked Shopping Lists to Shopping Cart		Add the all items from all marked Shopping Lists to your current Shopping Cart.
Delete Marked Shopping Lists		Delete all marked Shopping Lists. A prompt is displayed. Click the OK button to delete the marked Shopping Lists.
Create Shopping List		Create an empty Shopping List for future use

5. Create New Shopping List
You can create an empty Shopping List for future use. Click this icon to display these fields:



Where you can then enter the Shopping List details:


Private shopping list: New shopping list
Create new shopping list - Enter a name and save it using the button in the top right corner.
Name
Stationery
Description
Fortnightly stationery order

The following list describes how you work with the create Shopping List page:

Name	Enter a name for the new Shopping List.
Description	Enter a description for the new Shopping List.
Save Icon	Click the Save icon to validate, and if valid, save the new Shopping List.

There are no items in this new Shopping List. You will need to add items to this Shopping List if you wish to use it.

6. Working with Shopping List Items.
When you click on the name link for a Shopping List the contents of the list are displayed:

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The following list describes how you use the Shopping Items list page:

Show Item Details	You can click the Short Description for an item to view item details.
Quantity	You can change the quantity for an item.
Marked Box	Check the box for each item you to apply a particular action to (for example deletion or add to favourites).
Save Changes	Click this icon to save any changes to your Shopping List.
Delete Selected Items	Click this icon to delete all selected items. A prompt is displayed. Click the OK button to delete the selected items. Click the Cancel button to cancel the deletion
Add Selected Items to Favourites	Click this icon to add all selected items to your Favourites.
Add Selected Items Shopping Cart	Click this icon to add the all items from all marked Shopping Lists to your current Shopping Cart.
Back Icon	Click the Back icon to return to the Shopping Lists page. Changes are not saved

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3.11 Double Punch-out Sites

Overview

Punch out means you can go to a suppliers eProcurement site, shop and bring your items back to your shopping cart.

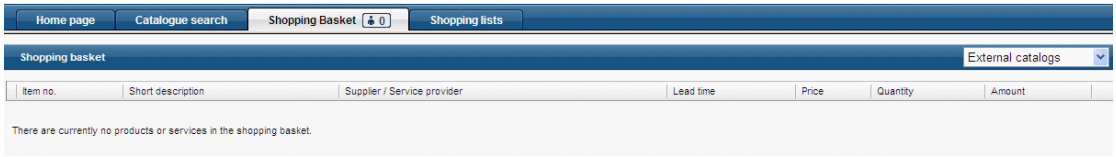
Whilst punch out sites can be provided for any Supplier they are commonly used when a standard catalogue may not be appropriate because of the need to personalise or configure a purchase e.g. a computer could be customised by adding extra memory or a larger hard disk.

Locate and Open the Shopping Cart

The following steps describe how you punch out to an external Supplier site from the ProcServe Marketplace.

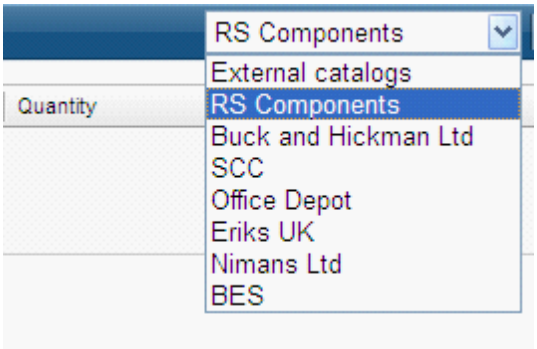
1. Click the Shopping Cart tab

2. The Shopping Cart is displayed:



Note: The above image shows an empty Shopping Cart. The cart could also have other items in it.

3. The External Catalogues Drop Down
Open the external catalogues drop-down list:



4. Select one of the External Suppliers from the drop down.

5. The selected Suppliers website will open in a new window.

6. Shop online with this Supplier as you usually would.

7. When you have finished your external shopping you can checkout.

8. The items you chose are displayed in Shopping Cart.

9. You can continue to shop or work on your Shopping Cart.

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4

Catalogue Management

4 Catalogue Management

4.1 Catalogue Management Introduction

Overview

Suppliers can provide buying organisation's catalogues which allow buyers to easily search for and select items to add to requisitions.

Before a supplier is able to provide catalogue content, they must be invited to the ProcServe Trading Network and be registered as a bronze supplier.

There are 3 different types of catalogues a buying organisation may have access to:

Single Buyer Catalogue	Catalogue is for a single buying organisation only.
Multi-Buyer Catalogue	Catalogues can be shared amongst selected buying organisations.
Public Catalogue	Catalogues are made available to all buying organisations. This is only available to a few organisations and is not covered by the content of this manual.

Note: Some of the sections within Catalogue Management may not be relevant to you dependant on your organisation set up.

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4.2 Accessing Catalogue Management

Overview

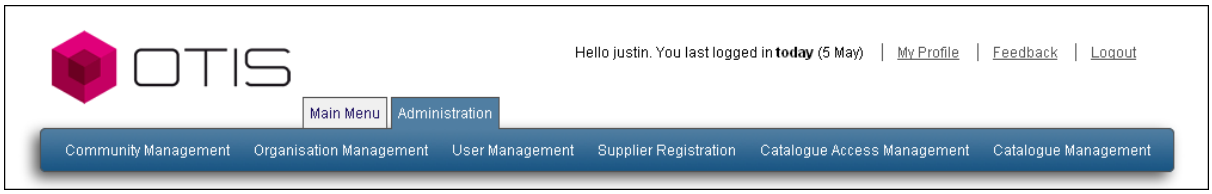
Within Catalogue Management you can upload and manage your catalogue content.

Note: Dependant on your community and organisation setup, some of the menus may appear in a different order.

To access Catalogue Management

1. Login to xchangewales.

2. Click on 'Catalogue Management'



A new window will open where you can administer catalogues as shown in the following sections.

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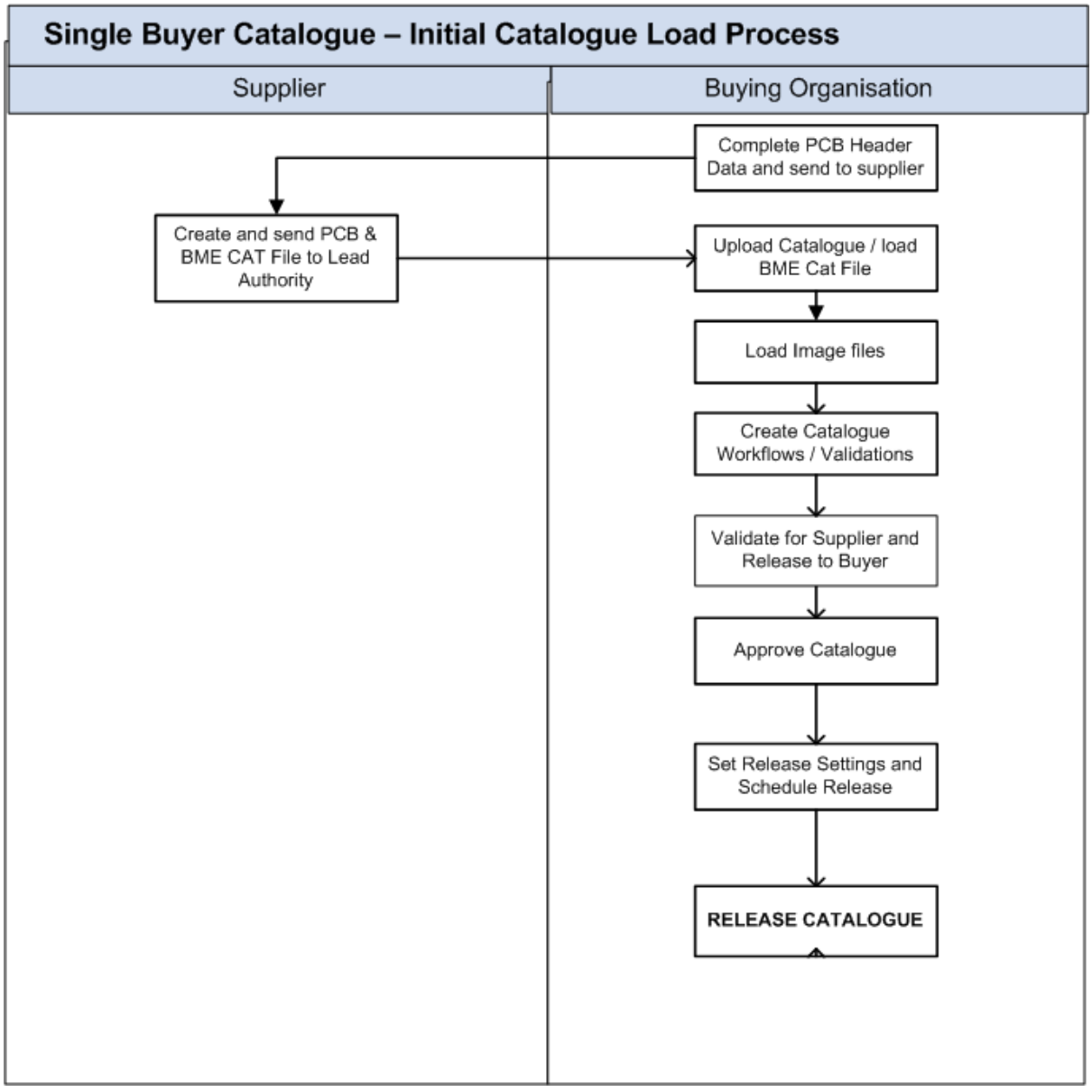
4.3 Single Buyer Catalogue Initial Load

4.3.1 Overview

This section describes the process of loading and configuring a catalogue for a single buying organisation using the Catalogue Management.


Single Buyer Catalogue – Initial Catalogue Load Process
Supplier
Buying Organisation
Complete PCB Header Data and send to supplier
Create and send PCB & BME CAT File to Lead Authority
Upload Catalogue / load BME Cat File
Load Image files
Create Catalogue Workflows / Validations
Validate for Supplier and Release to Buyer
Approve Catalogue
Set Release Settings and Schedule Release
RELEASE CATALOGUE

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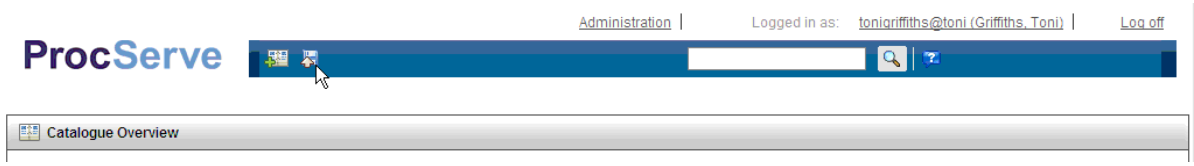
4.3.2 Importing the Catalogue

The following steps describe how you upload and configure a catalogue for the first time.

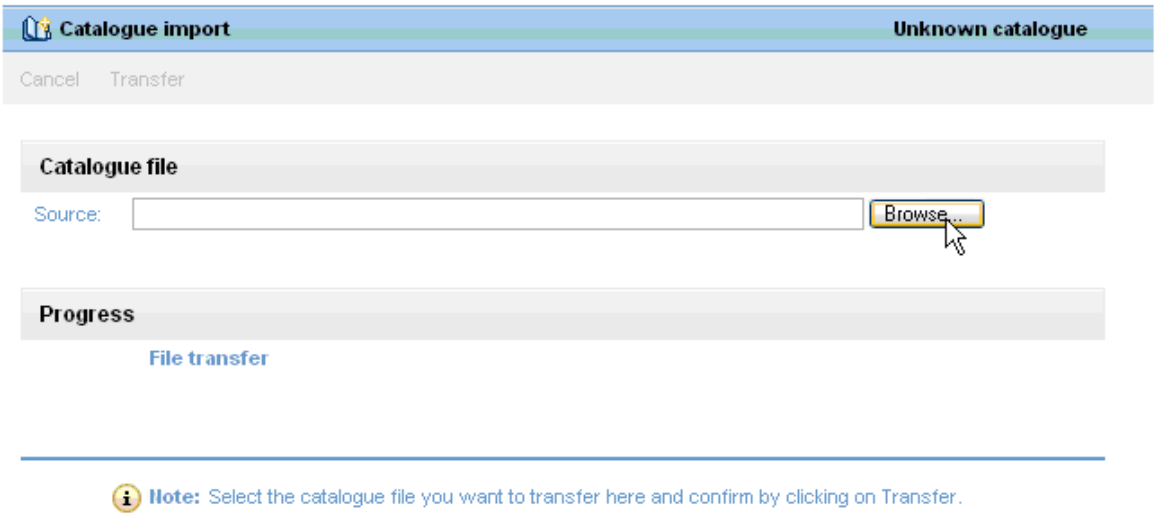
1. **Navigate Admin Menu >> Catalogue Management:**
   The catalogue manager is displayed.

2. **Click on Import Analysis**:



3. **Import the BMECat File:**

In the Import Analysis page click the Browse button or enter a path and file name in the source field.
Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.



4. **Click on Transfer in the top left corner:**

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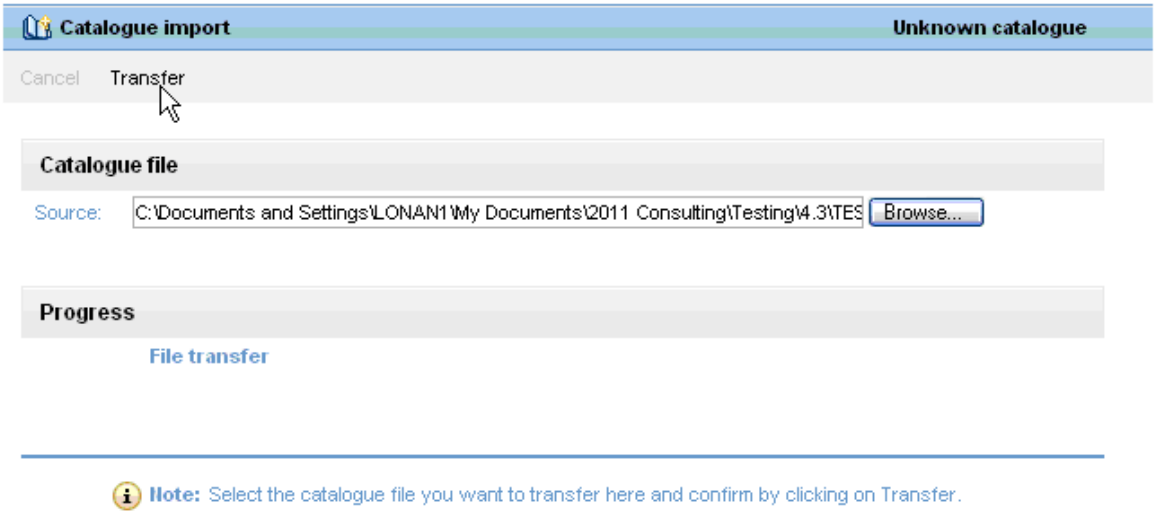
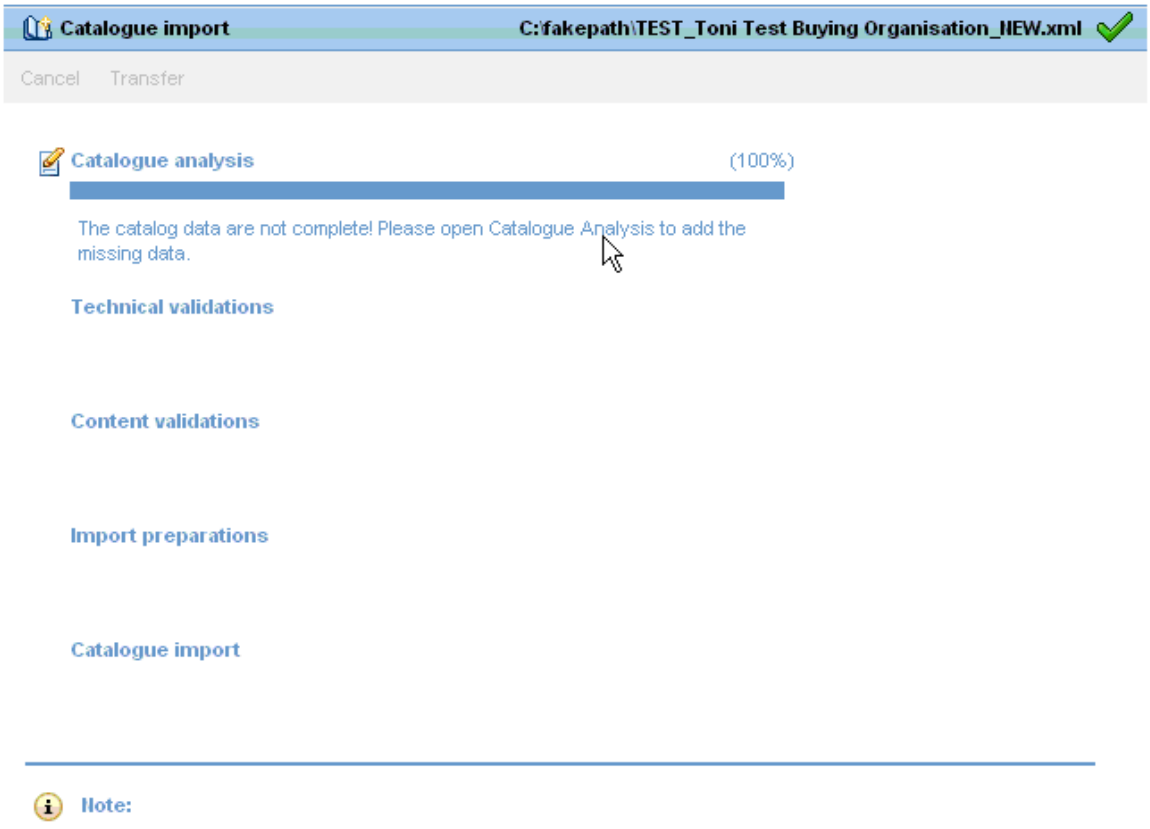


5. During the import process, catalogue manager will stop the import and you will be prompted to run a catalogue analysis. **Click on the catalogue analysis link:**



6. Verify the details in the catalogue analysis pop up window:

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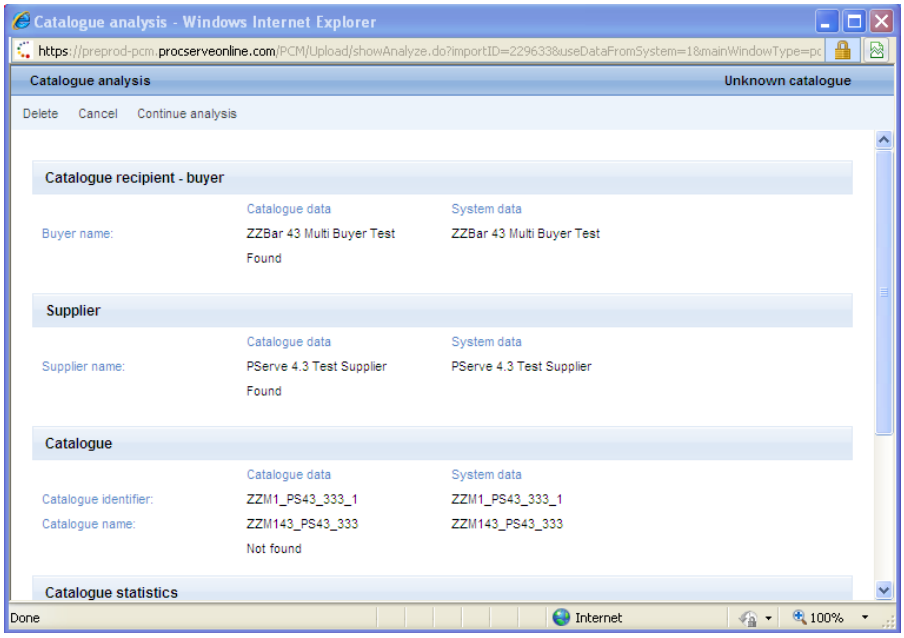

Note: Check the buyer and supplier are 'Found'. If not, click on cancel to exit the import and correct the errors in the ProcServe Catalogue Builder and reload the file.

Note: The catalogue should be 'Not Found' which is correct as its a new catalogue.

7. **Click on Continue Import**

8. **Once the import is successfully completed the confirmation screen is displayed:**

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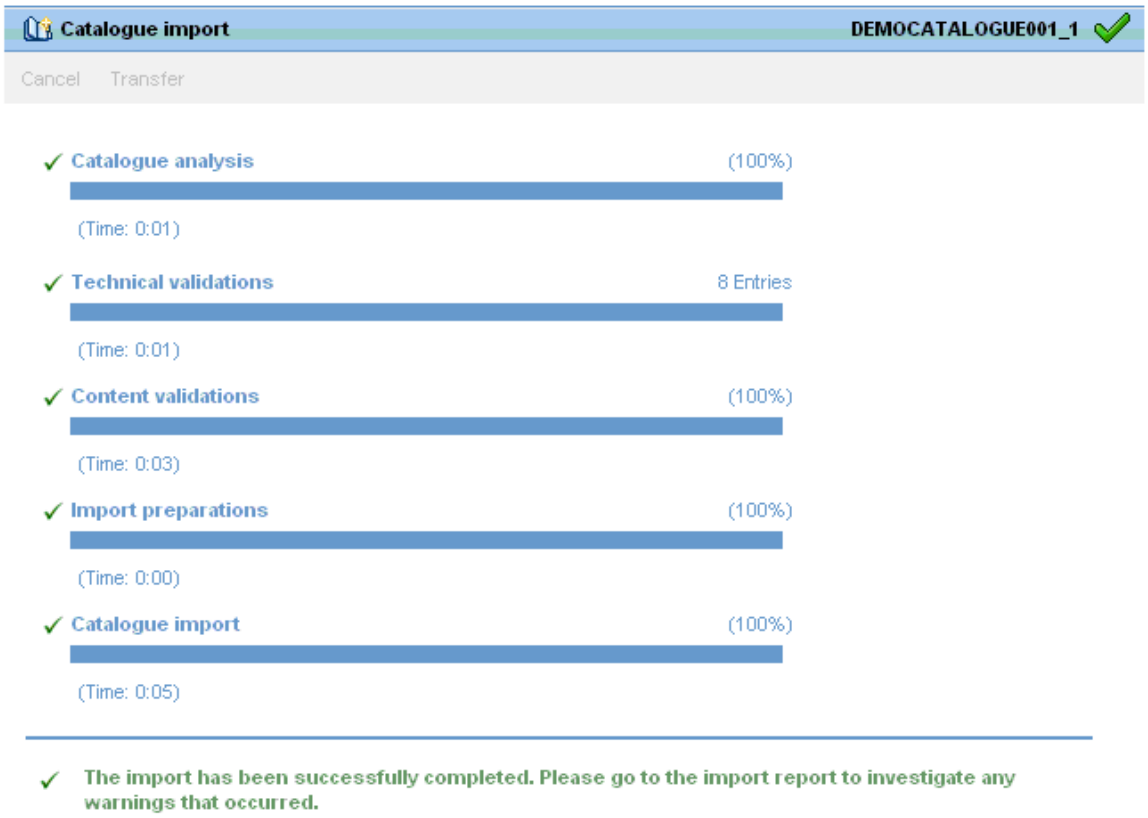
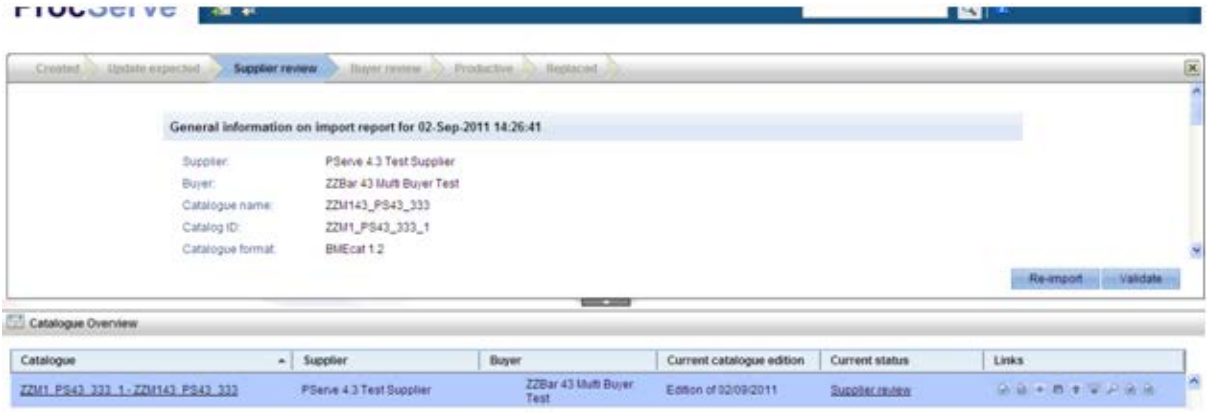


9. **Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen**

10. **The catalogue will now be in Supplier Review:**



Select Validate to run the validation report and then select Release to Buyer.

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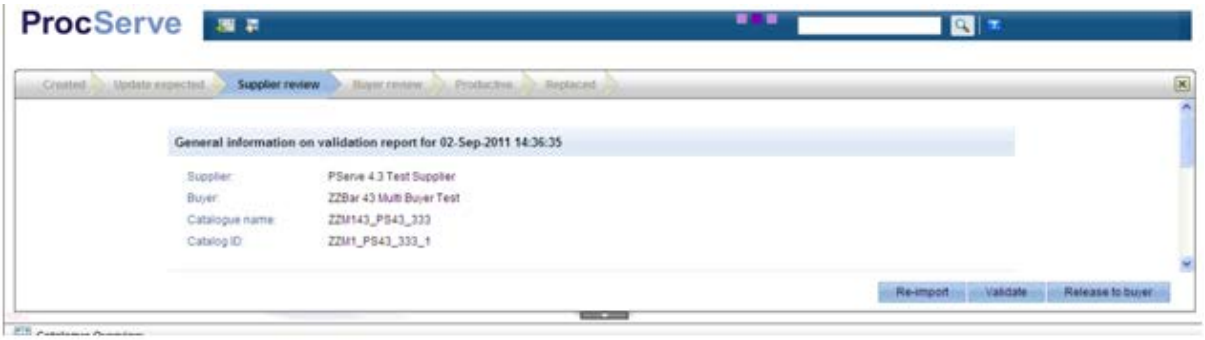
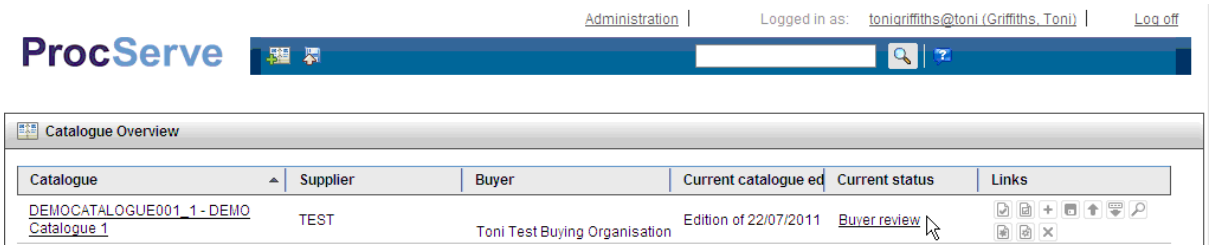


11. The catalogue will now be in Buyer Review:.



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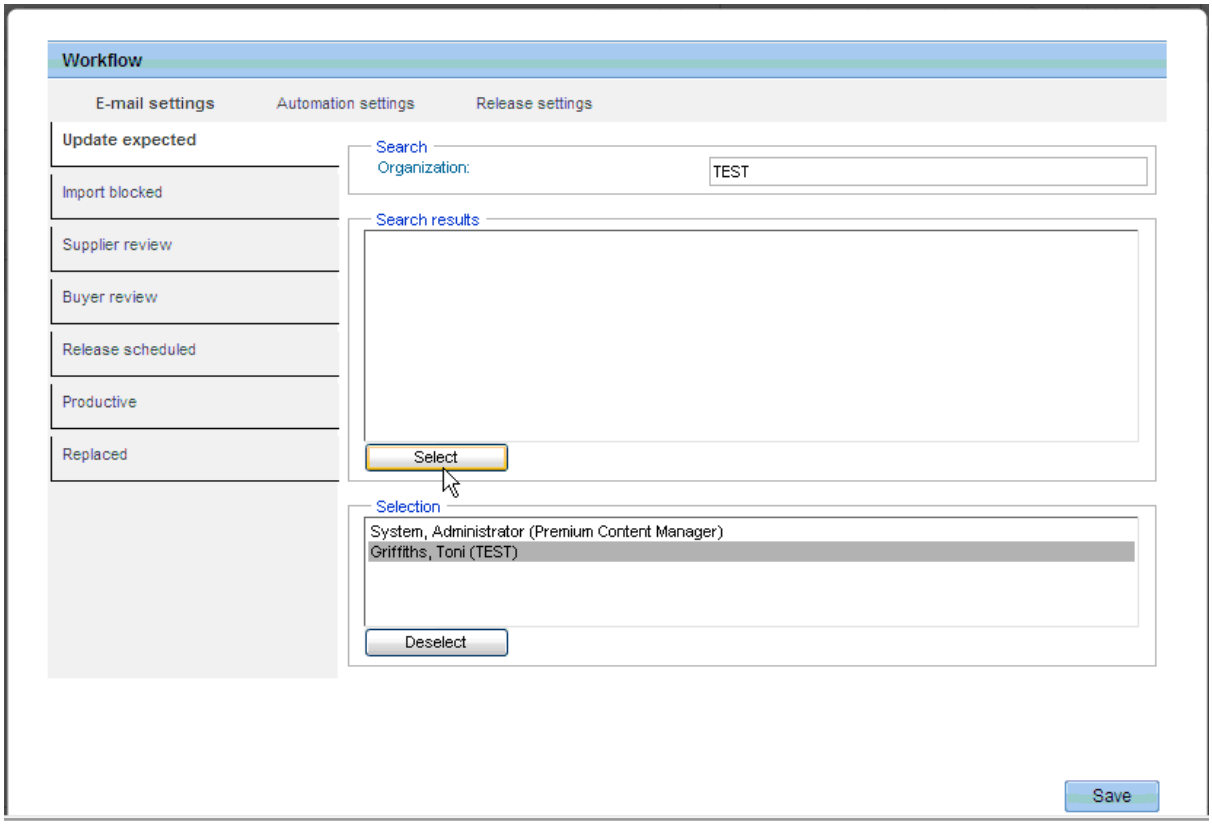
4.3.3 Configuring Catalogue Workflow

The workflow for the catalogue now needs to be configured to ensure that the necessary people from the buyer and supplier organisations are notified (by email) of catalogue changes and perform the appropriate administration duties for a particular catalogue. The workflow also determines if any steps are automated (for example supplier review in an initial load) as well as export options (such as scheduling). **Note:** The person/people selected for each workflow step is used to trigger an email notification and to give permission to users to complete tasks.

1. Select the catalogue workflow option:

2. Set up the email settings as required. Search for the relevant organisation on the top right:



3. Click on the relevant users and click on the select button (repeat as necessary):

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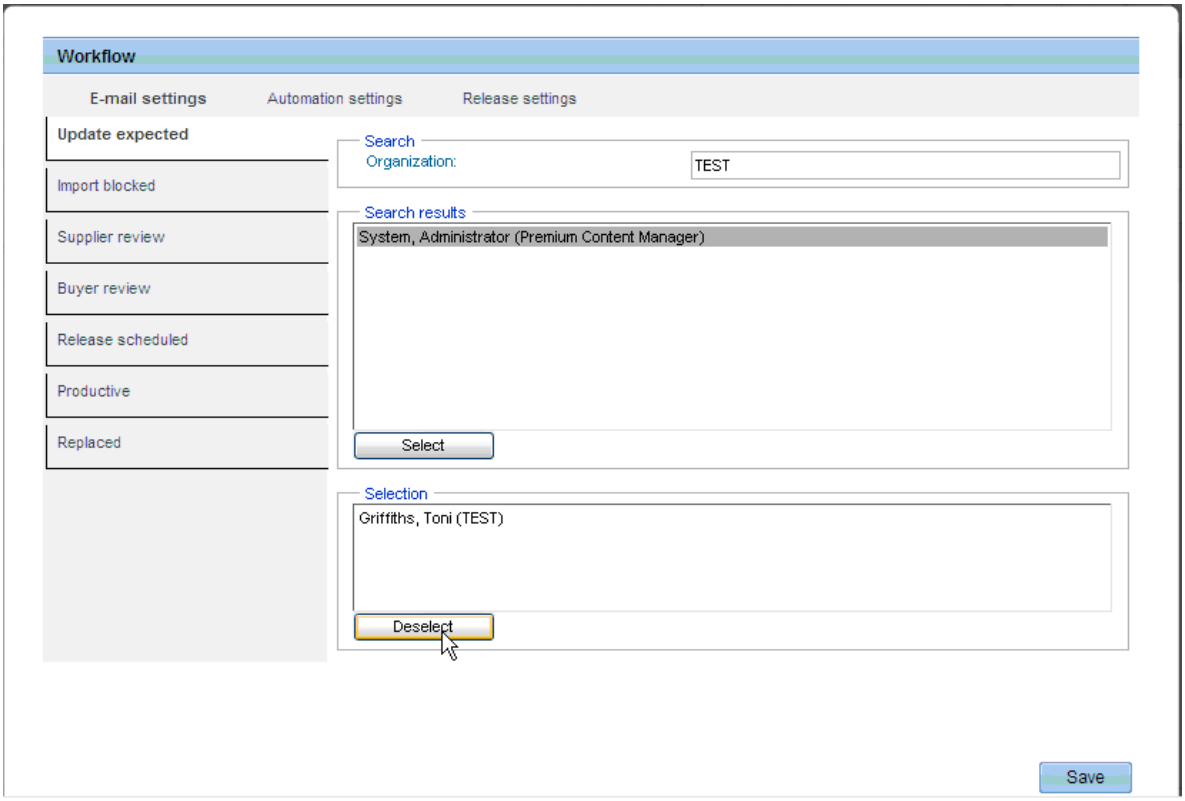
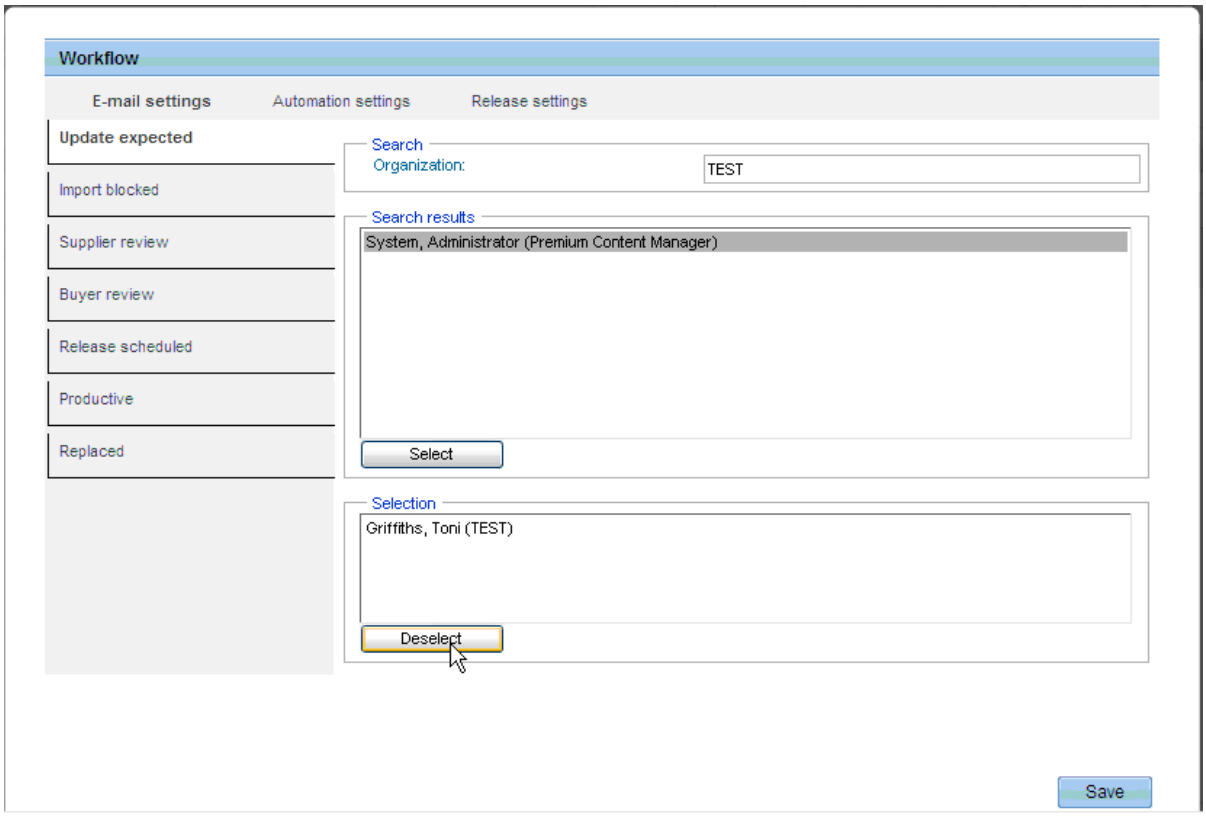


4. Click on any users within the selection that need to be removed and click on deselect (repeat as necessary):



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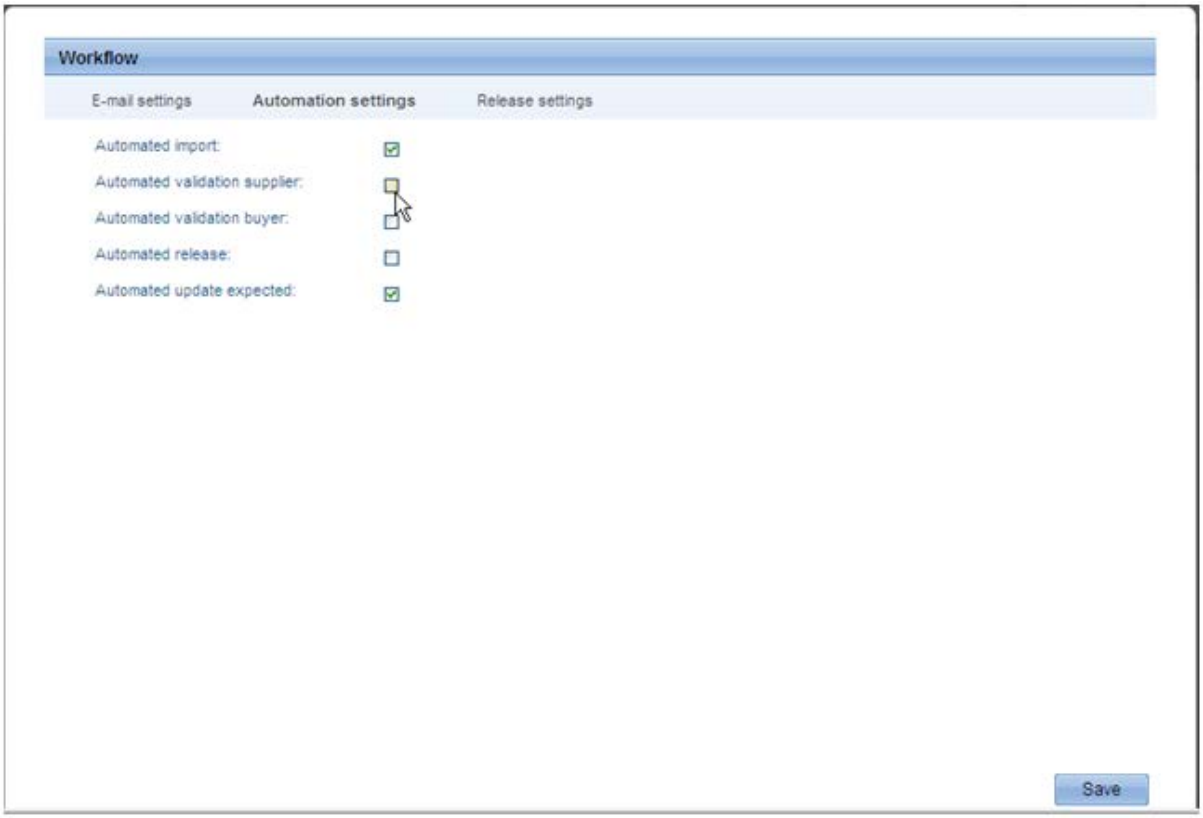
You need to set users for all 7 sections:

- Update Expected (Supplier Super User)
- Import Blocked (Supplier Super User)
- Supplier Review (Supplier Super User)
- Buyer Review (Buyer Super User)
- Release Scheduled (Buyer Super User)
- Productive (Buyer Super User)
- Replaced (Buyer Super User)

5. Ensure that the Automation settings are set as required (Click on Automation Settings)



Note: Suggested setting for standard catalogue is to deselect Automated validation supplier to enable Supplier Review status on subsequent loads

6. Check release settings are as required:

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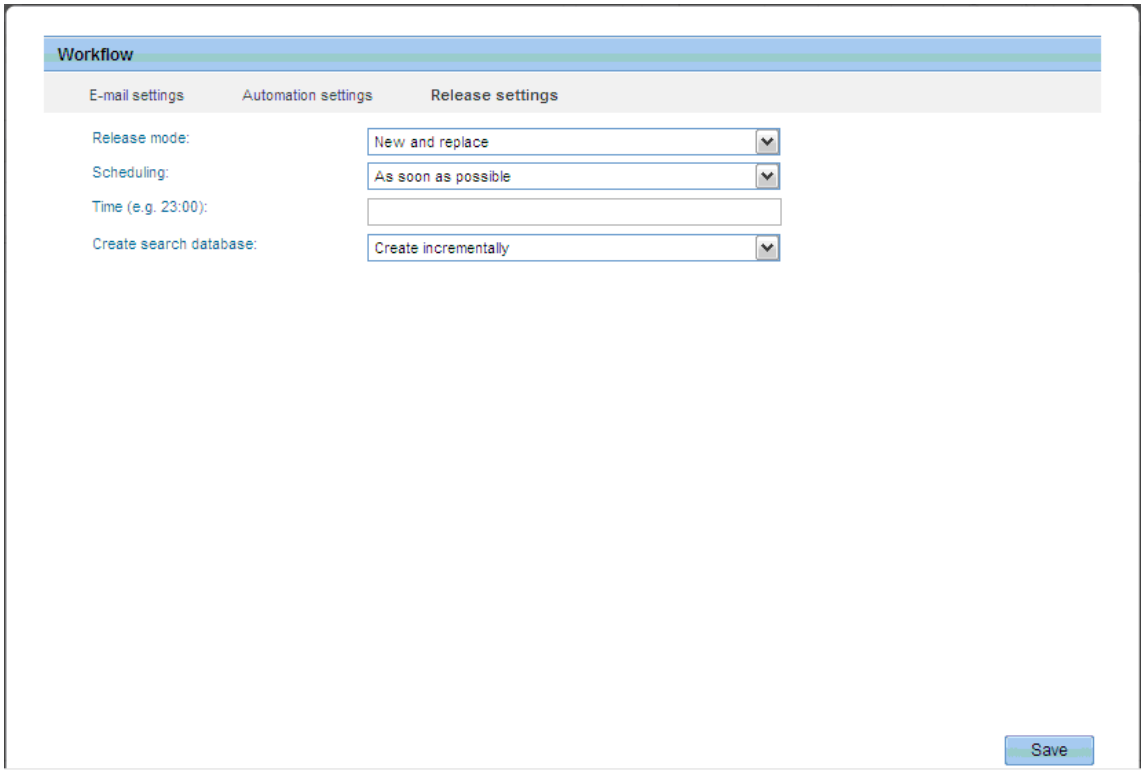

6. Click on Save

7. Click on close or click outside of the catalogue

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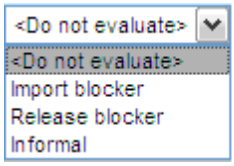
4.3.4 Validating your Catalogue

The catalogue will automatically inherit the standard validation that has been defined for all catalogues in your organisation. You are able to change the validations against a specific catalogue if you wish.

1. Amending the validation profile from your standard profile
Select the validation profile icon for your catalogue

To change the evaluation against a rule, select an option from the drop down list (options vary depending on the type of rule):



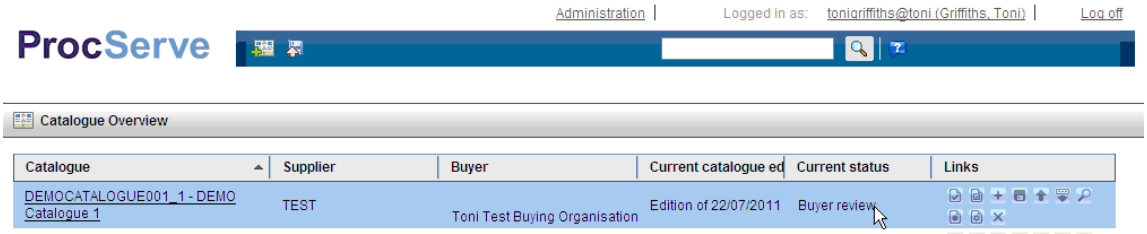
To add a rule, select a similar rule and click on the "Create a new rule based on this rule" icon

Change the required details and click on save

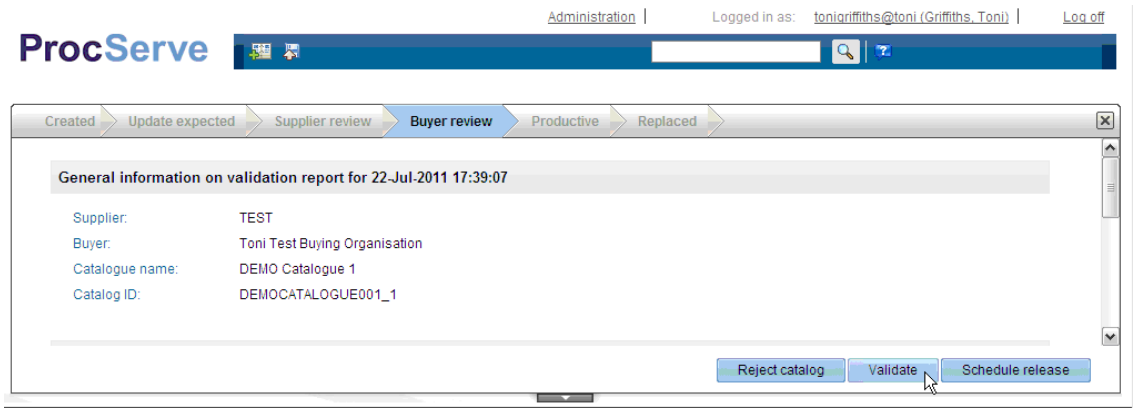
Tip: Ensure you give the rule a meaningful name so that others can recognise what that rule checks for

Tip: Do not amend rules as this amends the rule for all catalogues and organisations on the system.

2. Click on the Buyer Review status link for the catalogue:



3. Select Validate to validate the catalogue against the validation rules set for this catalogue:



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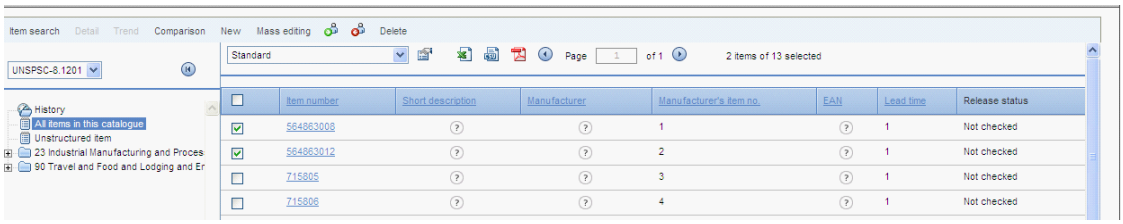
4.3.5 Approving your Catalogue

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer icon to review the catalogue items

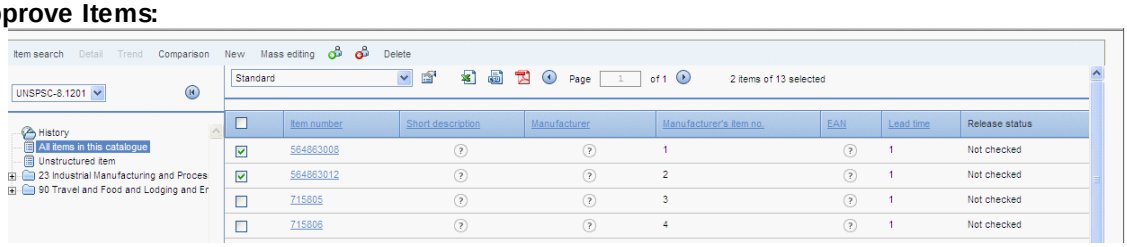


2. You can now approve and/or reject the items loaded:
Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon to the top right of the page. The item is now marked for rejection.

Note: You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

Approve Items:



When you are sure that an item is correct, you can check the relevant items and click the Approve icon to the top right of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

Note: If changes are required then you can both amend through the ProcServe Catalogue Manager Catalogue explorer interface, or via the ProcServe Catalogue Builder and re-import the file.

Note: Any new file imported will over write the old data where the header data is the same.

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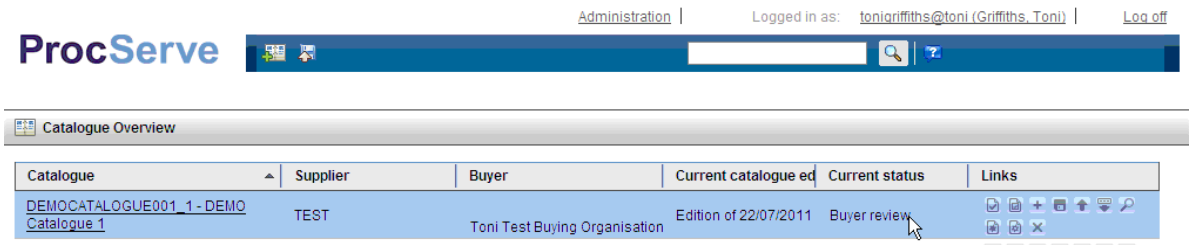
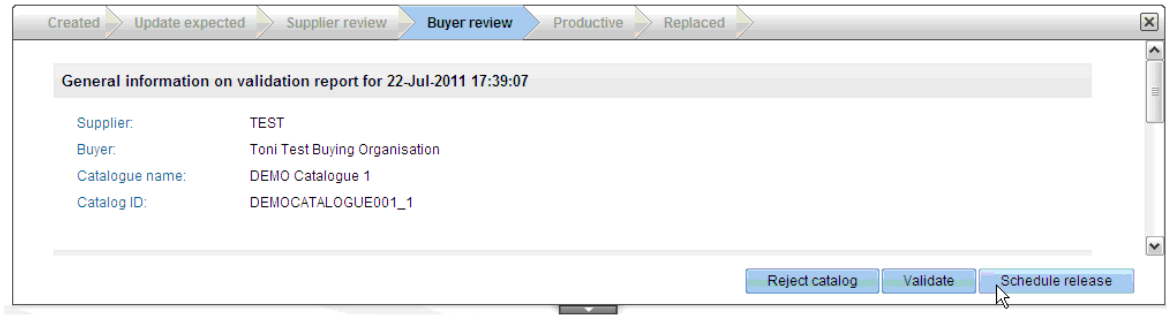
4.3.6 Exporting your Catalogue

You can now release your catalogue.

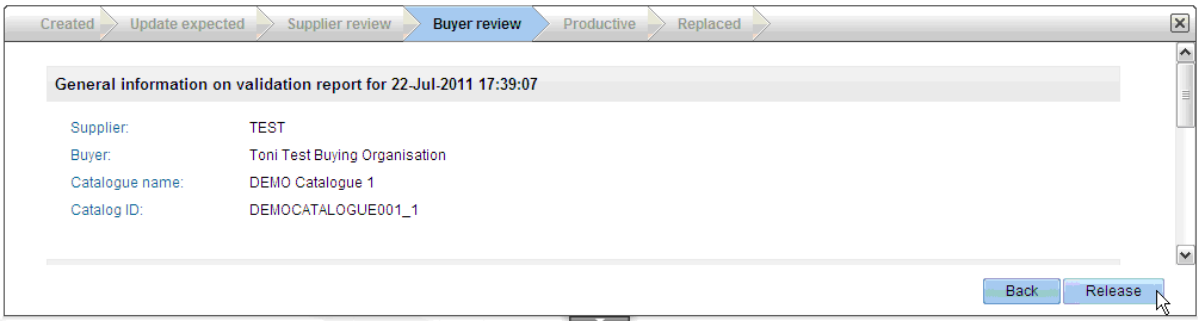
1. Click on the Buyer Review link for the catalogue



2. You can now select 'Schedule Release'



3. Then click on 'Release' to export the Catalogue



The catalogue will now be scheduled for release or released immediately according to the release settings configured for this catalogue.

The catalogue Status will now change to 'Update Expected'.

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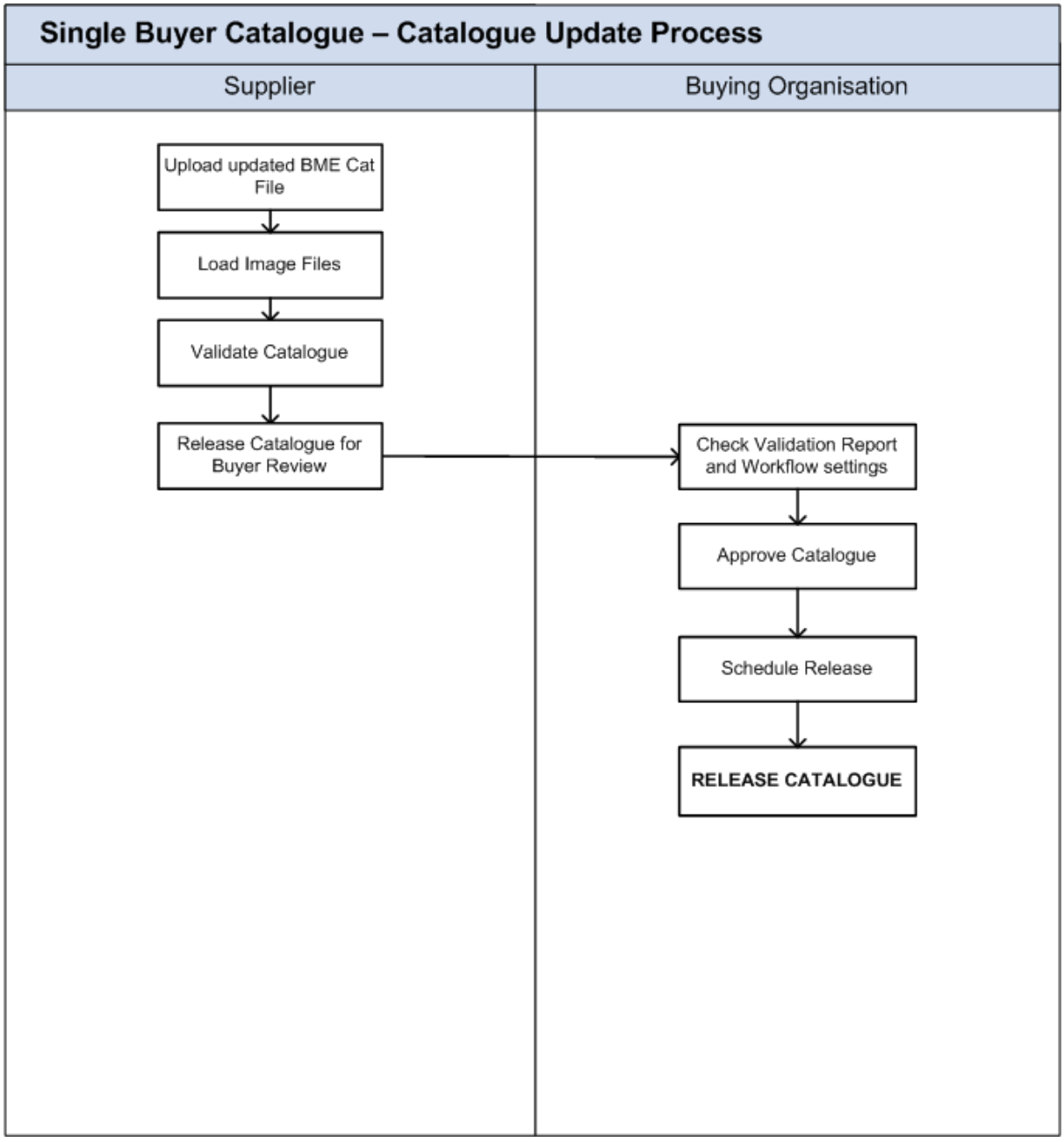
4.4 Single Buyer Catalogue Updates

4.4.1 Overview

This section describes the process a supplier will follow to load catalogue updates using a BMECat file.

Note: The updated load of a catalogue is normally performed by a supplier. Should you need to update a catalogue, for any reason, the below steps can be followed.

If the supplier is performing the update, please go to the Approving you Catalogue and Exporting your Catalogue within the multi-buyer catalogue section.



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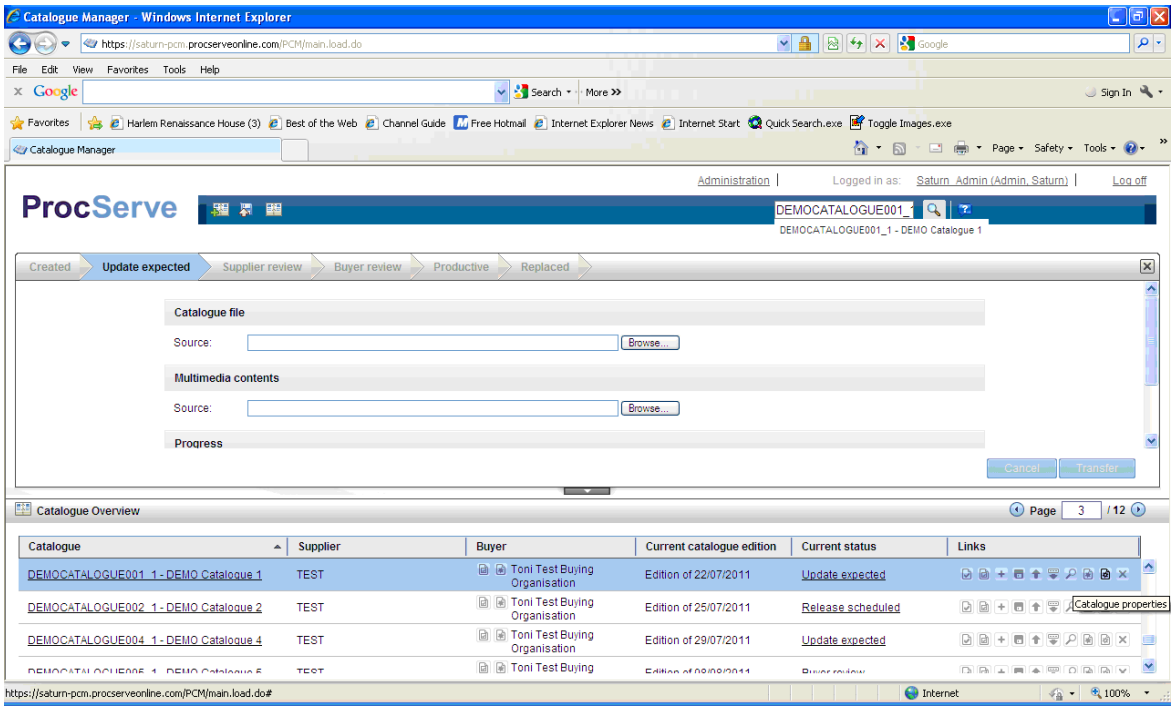
4.4.2 Importing the Updated Catalogue

The following steps should be completed by the supplier:

1. Navigate Admin Menu >> Catalogue Management.

2. The Catalogue Manager is displayed. Select the Catalogue and the actions that can be completed at this stage will be available.



3. Import BMECat File. Click the browse button on the catalogue file path:

Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.

4. Click the Transfer button in the right.

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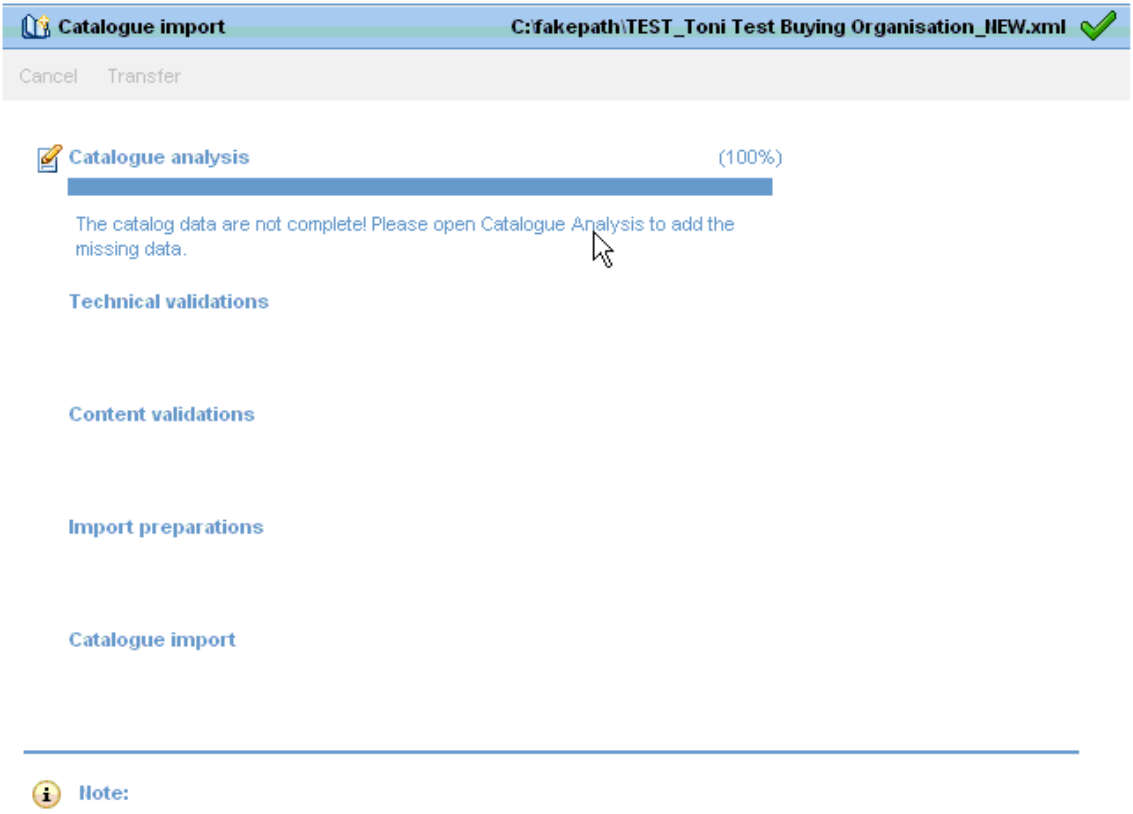

5. The Summary page is displayed:

6. Once the import is successfully completed the confirmation screen is displayed:

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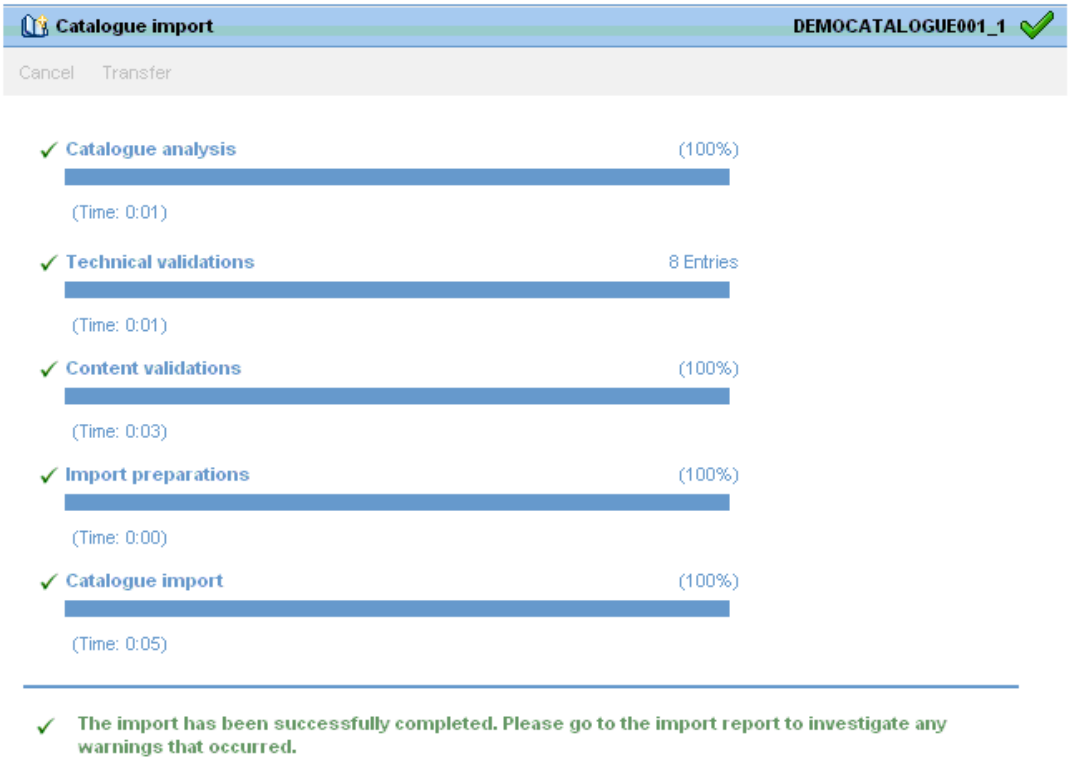
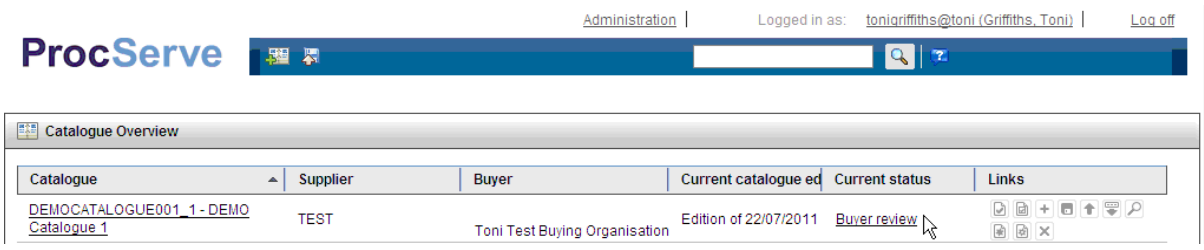


7. Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen

Note: Depending on the workflow configured for this catalogue, the catalogue will now go to Supplier Review. An email will be sent to the nominated supplier user to prompt them to complete this.



Buyer Review: Once a supplier has performed the upload they will release the catalogue to buyer review. The ProcServe Catalogue Management System will automatically email you, providing the workflow was correctly configured, so you can complete the rest of the process.

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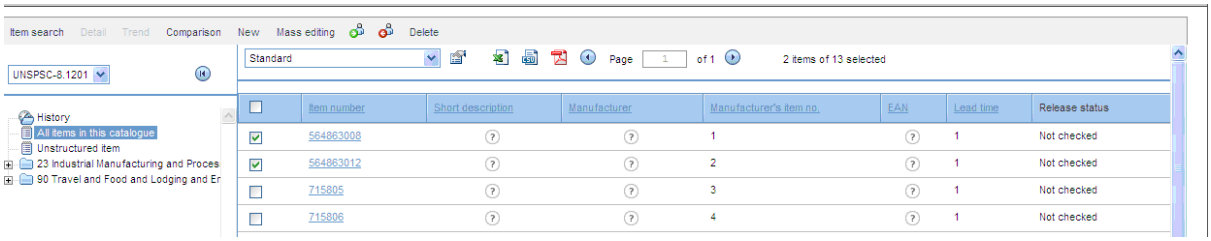
4.4.3 Approving your Catalogue

The buyer review is now required. The buyer contract manager will need to check and then approve the items / catalogue.

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer from Links.

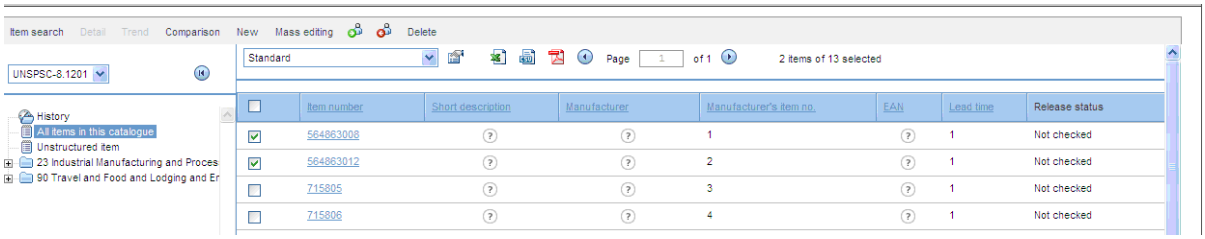


2. You can now approve and/or reject the items loaded: Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon to the top right of the page. The item is now marked for rejection.

Note: You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

Approve Items:



3. When you are sure that an item is correct, you can check the relevant items and click the Approve icon to the top right of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

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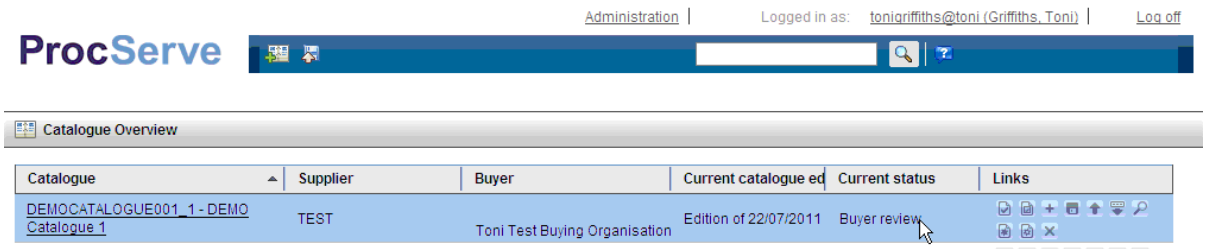
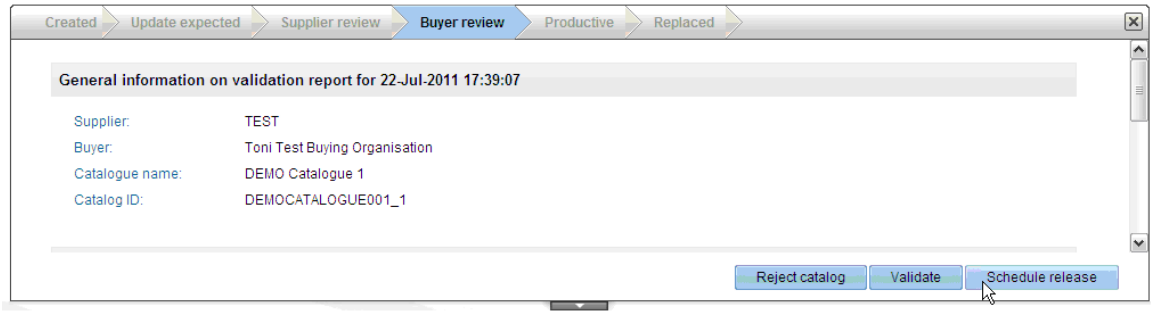
4.4.4 Exporting your Catalogue

You can now release your catalogue.

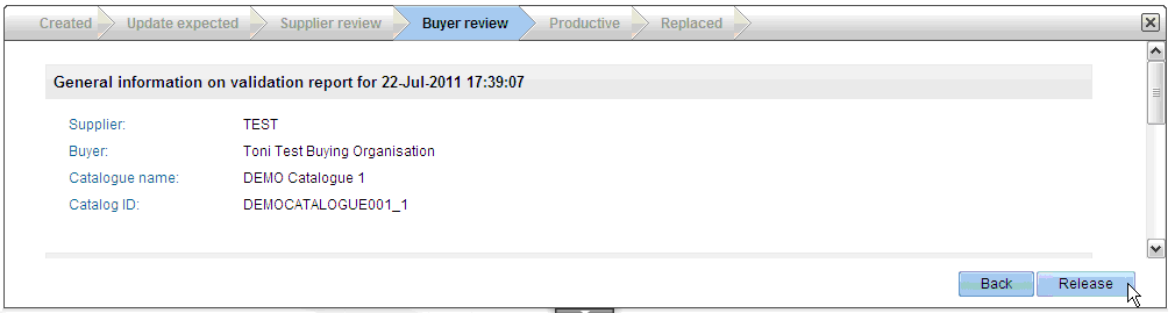
1. Click on the Buyer Review link for the catalogue



2. You can now select 'Schedule Release'



3. Then click on 'Release' to export the Catalogue



The catalogue will now be scheduled for release or released immediately according to the release settings configured for this catalogue.

The catalogue Status will now change to 'Update Expected'.

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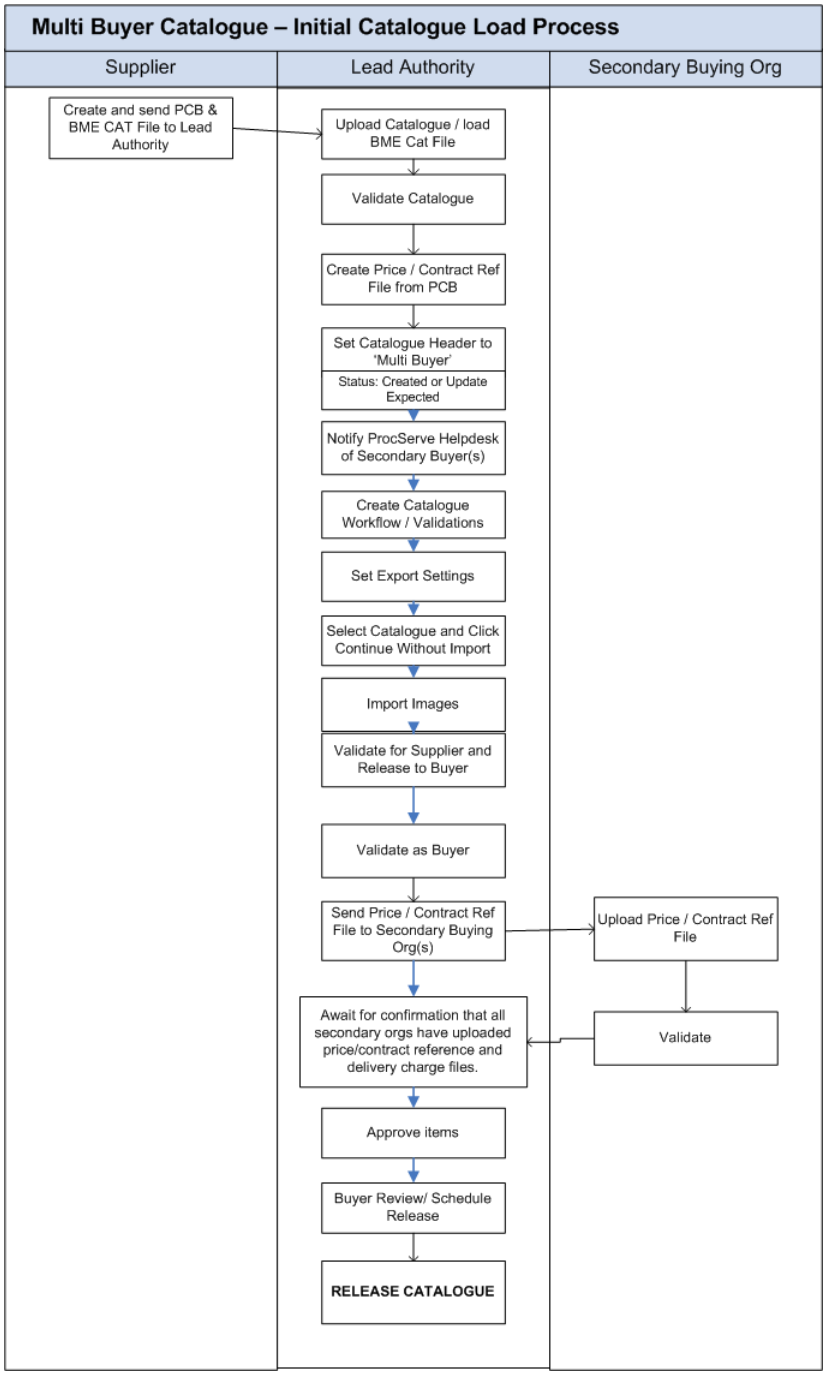
4.5 Multi-Buyer Catalogue - Load and Configure Initial Catalogue Load

4.5.1 Overview

This section refers to catalogues that are used by more than one organisation.

To utilise the multi buyer catalogue feature you will need to obtain the catalogue from the supplier. From this you can create a price file and if required a contract reference file to be used by any further buying organisations (referred to as secondary buying organisations).


Multi Buyer Catalogue – Initial Catalogue Load Process
Supplier
Lead Authority
Secondary Buying Org
Create and send PCB & BME CAT File to Lead Authority
Upload Catalogue / load BME Cat File
Validate Catalogue
Create Price / Contract Ref File from PCB
Set Catalogue Header to 'Multi Buyer'
Status: Created or Update Expected
Notify ProcServe Helpdesk of Secondary Buyer(s)
Create Catalogue Workflow / Validations
Set Export Settings
Select Catalogue and Click Continue Without Import
Import Images
Validate for Supplier and Release to Buyer
Validate as Buyer
Send Price / Contract Ref File to Secondary Buying Org(s)
Upload Price / Contract Ref File
Validate
Await for confirmation that all secondary orgs have uploaded price/contract reference and delivery charge files.
Approve items
Buyer Review/ Schedule Release
RELEASE CATALOGUE

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4.5.2 Importing your Catalogue (BMECat File)

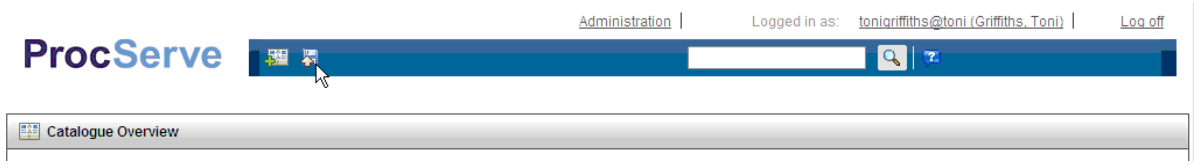
If the catalogue is new then the multi-buyer process can begin with the initial upload of the BMECat file. If you are converting an existing private catalogue, then please read the next section in this chapter.

Importing your Catalogue (BMECat File)

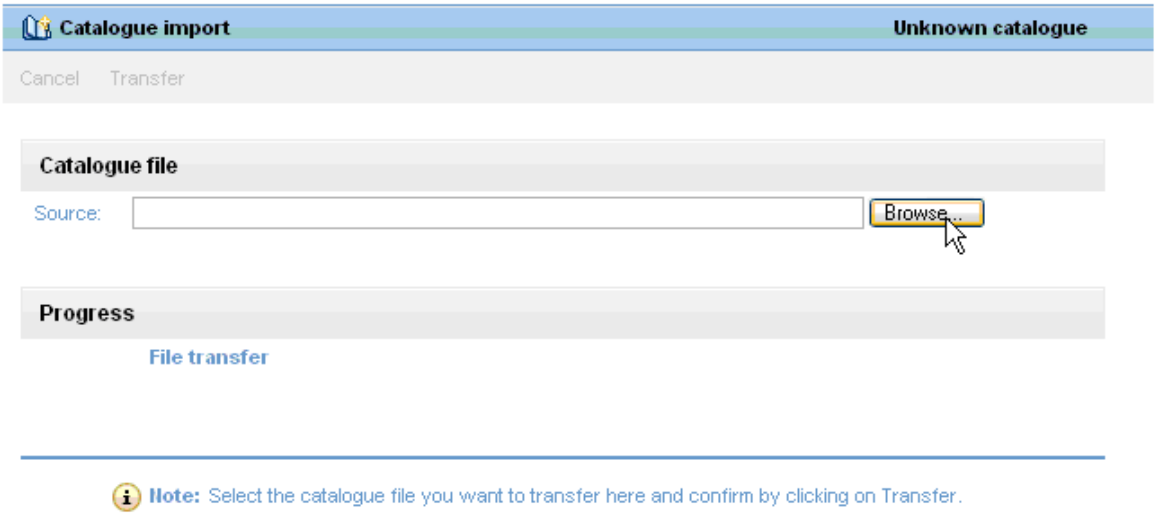
After the has been checked and the BMECat file is ready for upload to ProcServe you need to use the Catalogue Manager to upload and configure the imported catalogue.

1. Navigate Admin Menu >> Catalogue Management
The Catalogue Manager is displayed.

2. Select the Import Analysis Icon:



3. Import BMECat File:
In the Import Analysis page click the **Browse** button or enter a path and file name in the source field



4. Click the Transfer button in the top left:

Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.

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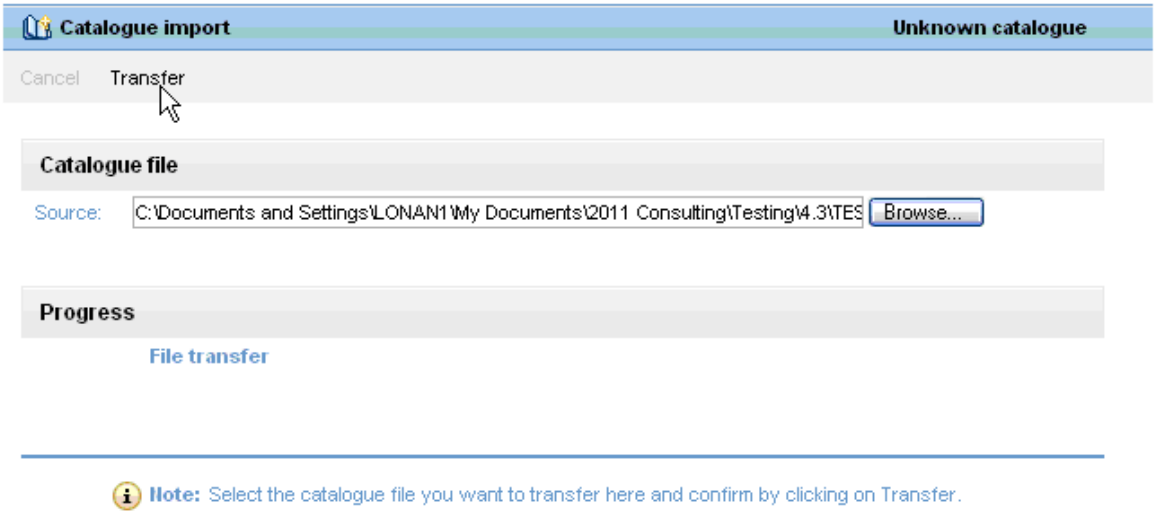
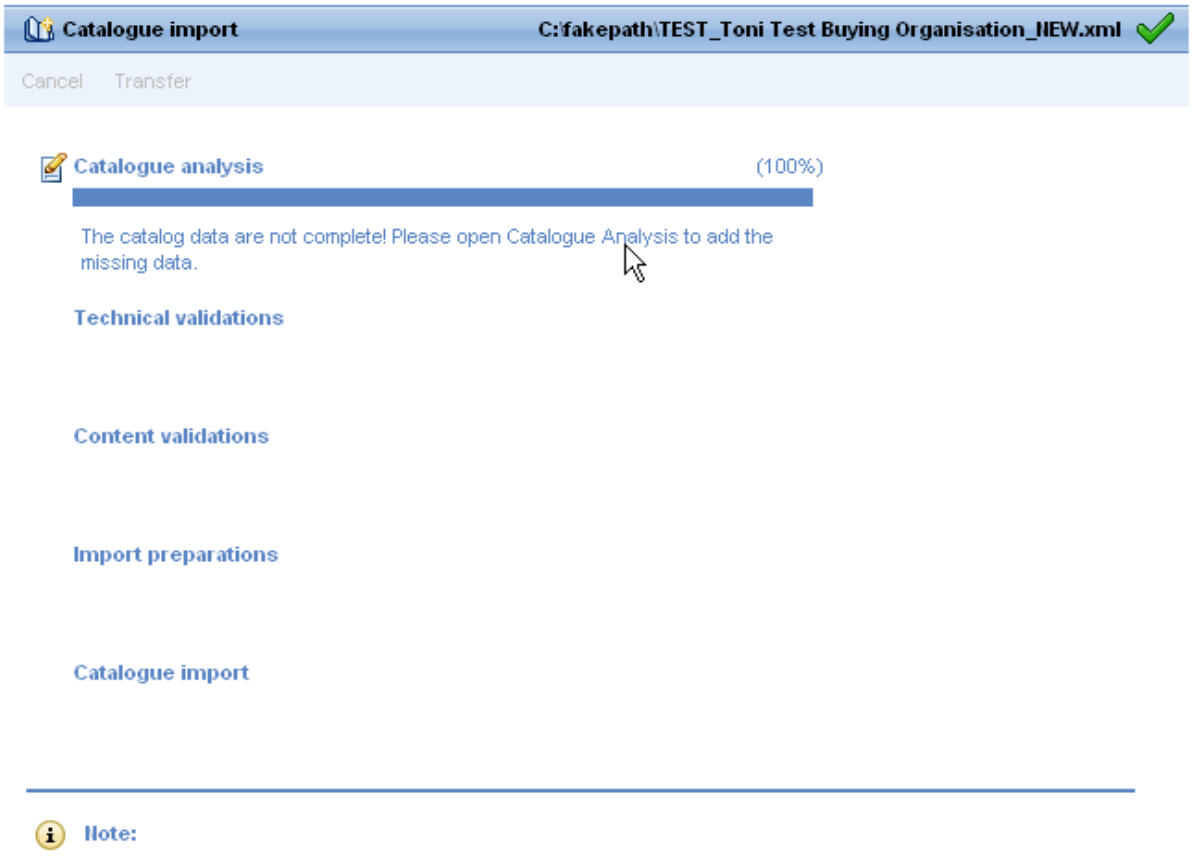


5.During the import process Catalogue Manager will stop the import and you will be prompted to run a Catalogue Analysis - click on the Catalogue Analysis link:



6. Verify the details in the Catalogue Analysis pop up window:

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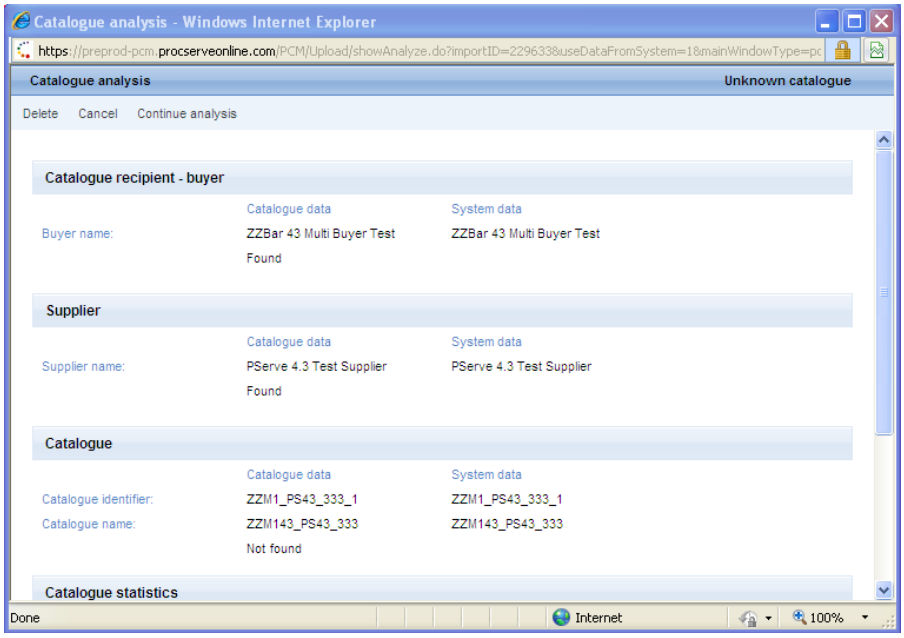

Note: Check the buyer and supplier are 'Found'. If not, click on cancel to exit the import and correct the errors in the ProcServe Catalogue Builder and reload the file.

Note: The catalogue should be 'Not Found' which is correct as it's a new catalogue. If this is ‘found’ this means that the catalogue ID is already in use for another catalogue. In this situation you will need to create a new catalogue ID in the Catalogue Builder and reload.

7. Select Continue Analysis.

8. Once the import is successfully completed the confirmation screen is displayed:

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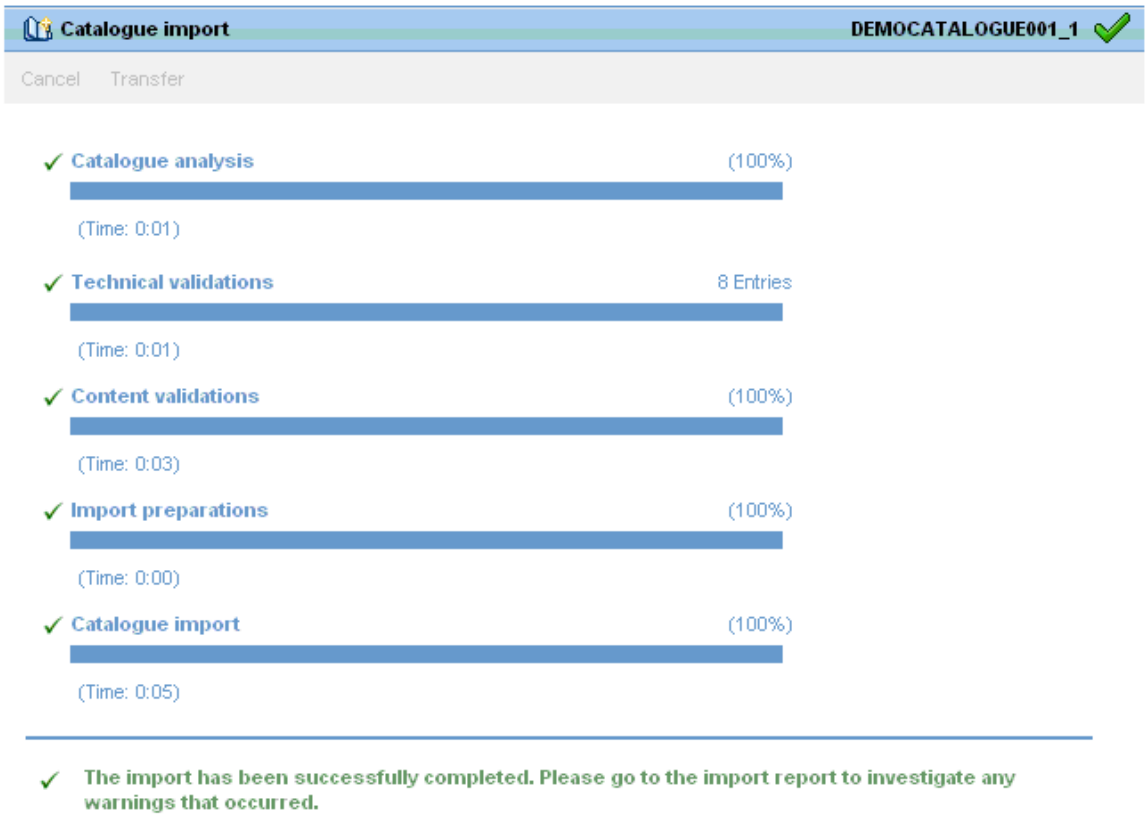
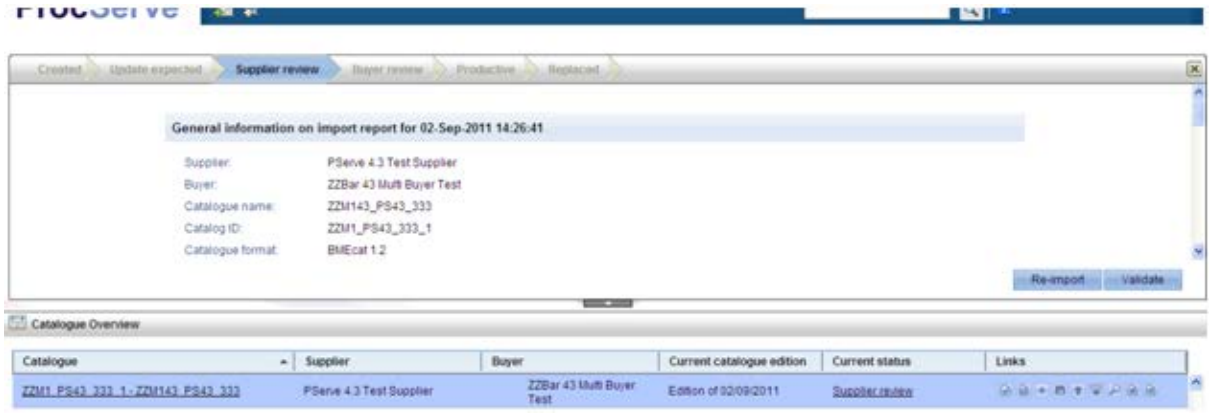


9. Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen

10. The Import Report will now be displayed and the catalogue will now be in Supplier Review:



11. Select Validate to run the validation report:

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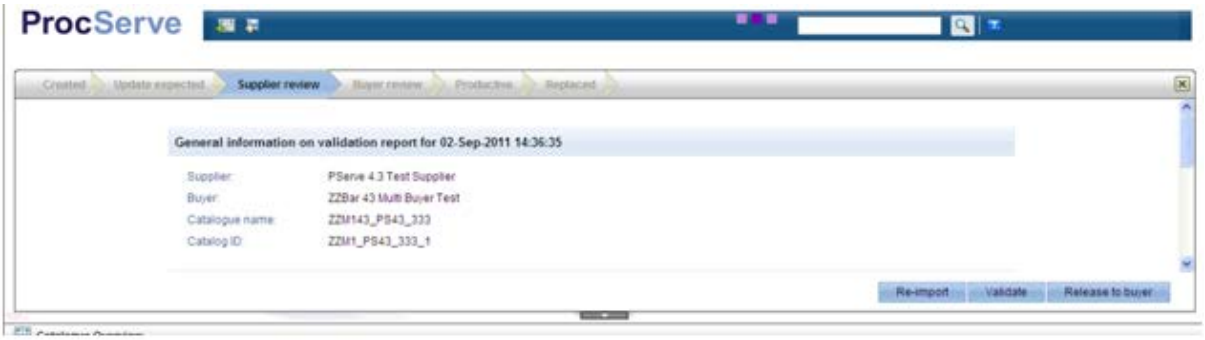

12. If the Validation Report has run without errors, you can now create the additional files for secondary buying organisations, and set the catalogue to be multi-buyer.

13. If errors have been found in the validation report, you will need to address these before creating additional files.

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4.5.3 Creating the Additional Files for Secondary Buying Organisations

Each secondary buying organisation that requires access to a multi buyer catalogue will need to load, separately, additional files. These should be created by the lead buying organisations using the ProcServe Catalogue Builder that the supplier completed to ensure consistent and complete data.

Note: In some instances the data can be taken from the ProcServe Catalogue System and, where applicable, this has been narrated in the manual.

The additional files which may be used include:

-Price File (Mandatory)
-Contract reference file (Optional)
-Delivery charge file (Optional)
-Icons file (Optional)

To create the files you need to copy data from the ProcServe Catalogue Builder into another spreadsheet

For the latest file templates please contact the ProcServe service desk.

The below tables highlight which columns data is copied from and pasted into.

Price File from the ProcServe Catalogue Builder

The below table shows you which columns in the ProcServe Catalogue Builder relate to the price file Template columns.

PCB column name	Price file template column name
Supplier Item ID	Item Number
Unit Price	Amount
Minimum Order Quantity	LowerBound
Price Effective Date	Price Effective Date
Price Expiry Date	Price Expiry Date

Price File from the ProcServe Catalogue System

The below table shows the data required to create the Price File. This can be generated from the Reports in Catalogue Explorer.

By changing the drop down option and selecting the reports highlighted in the table below you can run each report to generate the data for the Price File. Note: Only two reports are required, Price List Detailed and Order Information.

Note: You will have to select all the items within Catalogue Explorer for the Excel button to appear so you can run the download.

Report	Column within Report	Price file template column name

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Price List Detailed	Item number	Item Number
	Price Quantity	Amount
Order Information	Minimum Order Quantity	LowerBound
Price List Detailed	Valid From	Price Effective Date
	Valid To	Price Expiry Date

Contract Reference File from the ProcServe Catalogue Builder

If you use the contract reference field in the ProcServe Catalogue Builder you will need to create a contract reference file.

The below table shows you which columns in the ProcServe Catalogue Builder relate to the contract reference File columns.

You need to copy the contract reference data from the original ProcServe Catalogue Builder into the contract reference template file. **Note:** You cannot retrieve this data from the Catalogue System.

PCB column name	Contract ref file template column name
Supplier Item ID	Item Number
Contract Reference	Contract Reference

Delivery Charge File from the ProcServe Catalogue Builder

Note: If the main catalogue has 50 items, the Delivery Charge File will also need to have 50 lines with the same Delivery Charge Rule. This is to ensure the Delivery Rule is visible to the user for all items in the catalogue.

PCB Source	Delivery Charge file template column name
Supplier Item ID	Item Number
Header on the ProcServe Catalogue Builder	DeliveryChargeRule

Delivery Charge File from the ProcServe Catalogue System

Note: If the main catalogue has 50 items, the Delivery Charge File will also need to have 50 lines with the same Delivery Charge Rule. This is to ensure the Delivery Rule is visible to the user for all items in the catalogue.

Source	Delivery Charge file template column name
Item Number from the Price List Detailed report	Item Number

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From an individual item within the catalogue: Navigate to Catalogue Explorer > Select the catalogue > view any item > scroll down and you can view the DELIVERYCHARGERULE	DeliveryChargeRule

Icons File from the ProcServe Catalogue Builder

The Icon file only needs completing and loading if the catalogue is utilising Icons.

PCB Source	Icon file template column name
Supplier Item ID	Item Number
Central-Hub-Item	Central-Hub-Item
Collaborative-Content-Item	Collaborative-Content-Item
Core-Item	Core-Item
Environment-Friendly-Item	Environment-Friendly-Item
Hazardous-Item	Hazardous-Item

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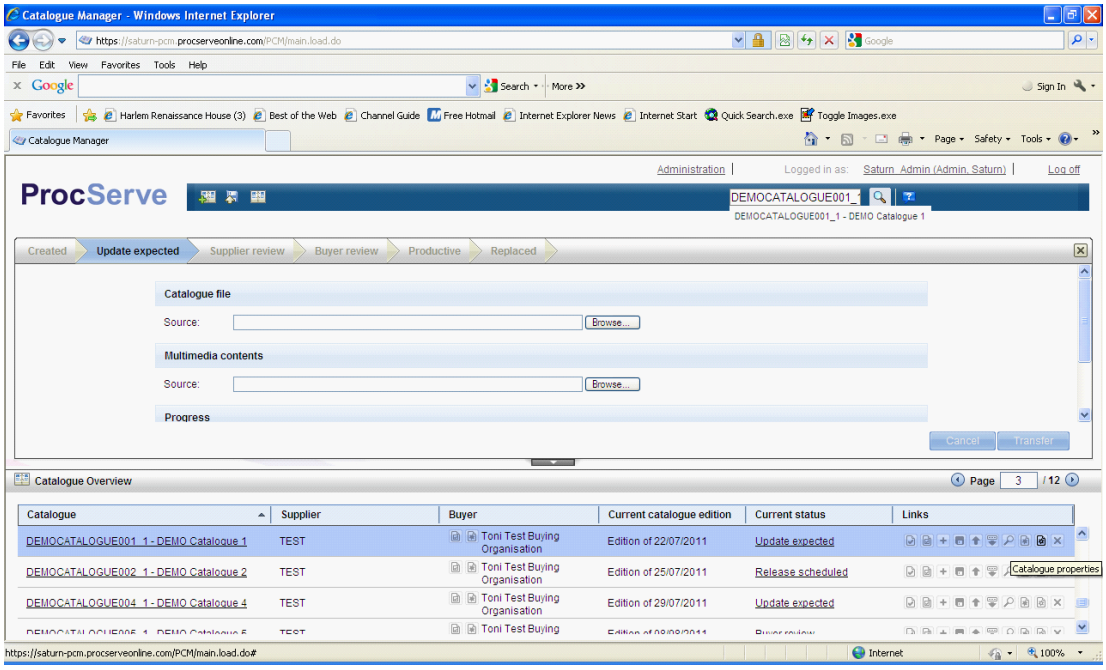
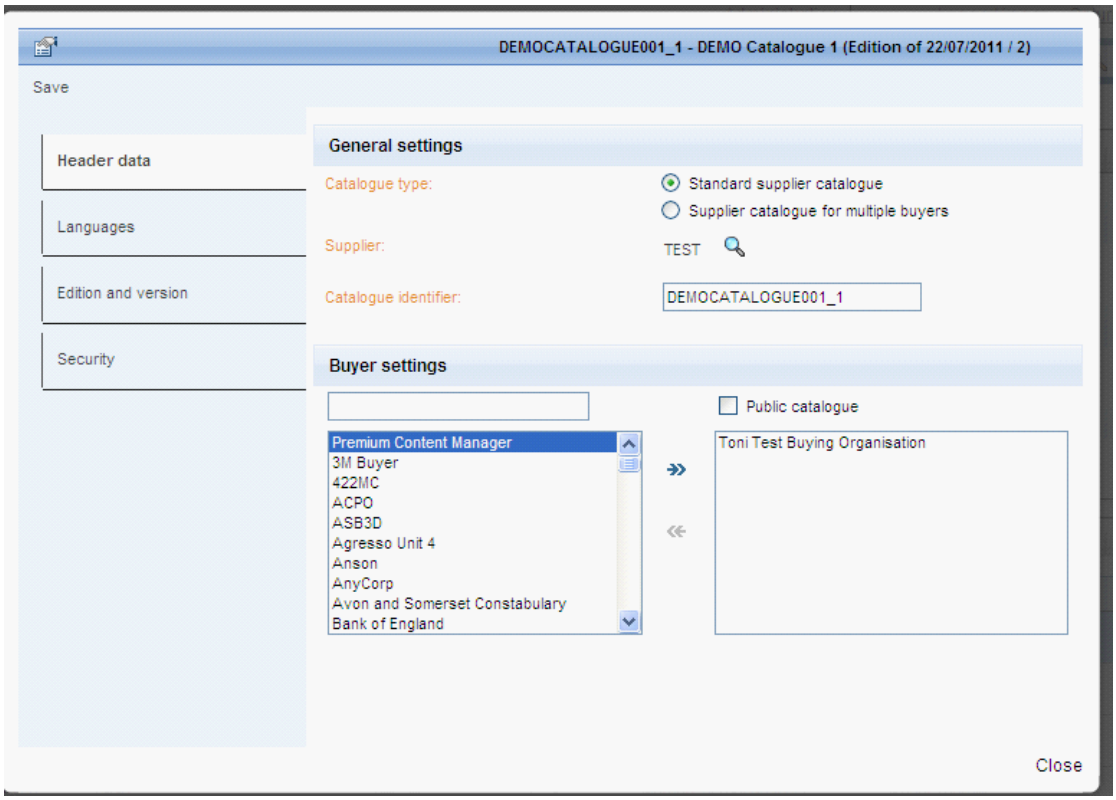
4.5.4 Setting the Catalogue to Multi-Buyer

The catalogue will need to be configured as multi-buyer so it can be shared with other buying organisations.

1. Select Catalogue Properties from the Links menu.



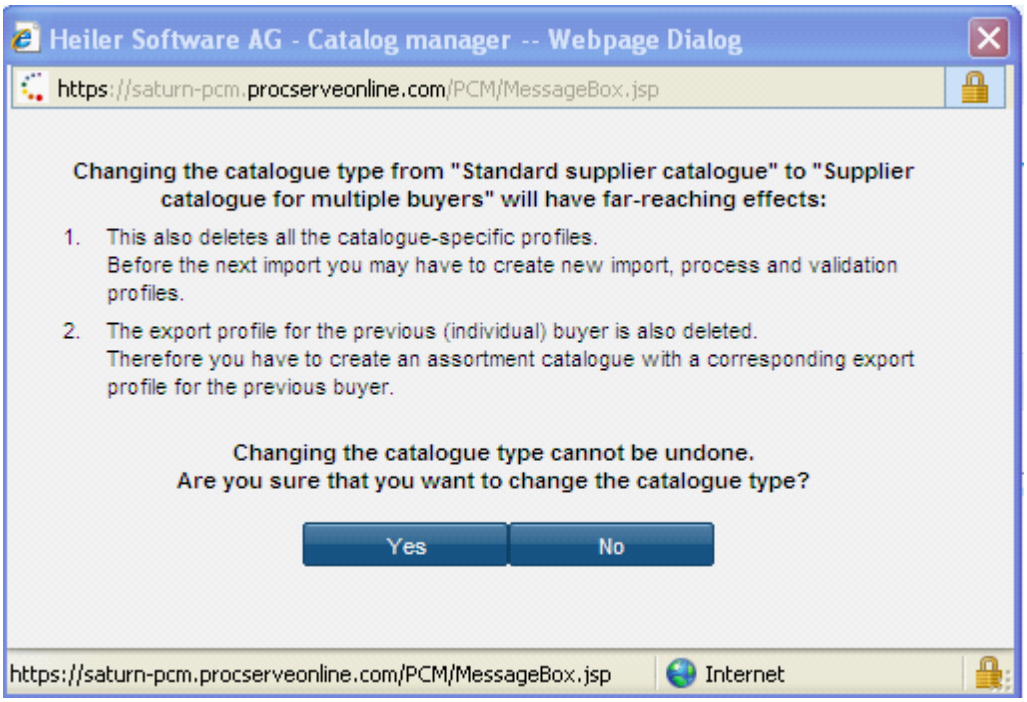
2. Open the header data tab from within the popup:



3. Select the 'supplier catalogue for multiple buyers' option as indicated in the above image:

Read the warnings and make sure you are working on the correct catalogue.

4. Click the yes button if you wish to convert the catalogue to multi-buyer or no to return to the header data tab:

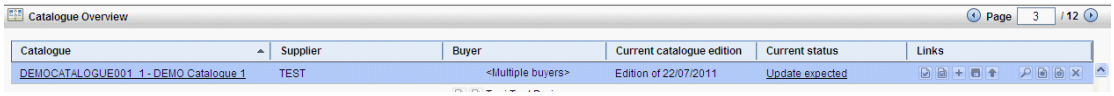

Heiler Software AG - Catalog manager -- Webpage Dialog
https://saturn-pcm.procserveonline.com/PCM/MessageBox.jsp
Changing the catalogue type from "Standard supplier catalogue" to "Supplier catalogue for multiple buyers" will have far-reaching effects:
1. This also deletes all the catalogue-specific profiles. Before the next import you may have to create new import, process and validation profiles.
2. The export profile for the previous (individual) buyer is also deleted. Therefore you have to create an assortment catalogue with a corresponding export profile for the previous buyer.
Changing the catalogue type cannot be undone.
Are you sure that you want to change the catalogue type?
Yes
No
https://saturn-pcm.procserveonline.com/PCM/MessageBox.jsp
Internet

5. Save changes
Click the save icon in the top left of the pop-up window to save the catalogue as multi-buyer

Tip: Changes will not be made to the system until you have saved the new header details.

6. The catalogue is now a multi-buyer catalogue:

7. The status of the catalogue will now revert to Created or Update Expected.



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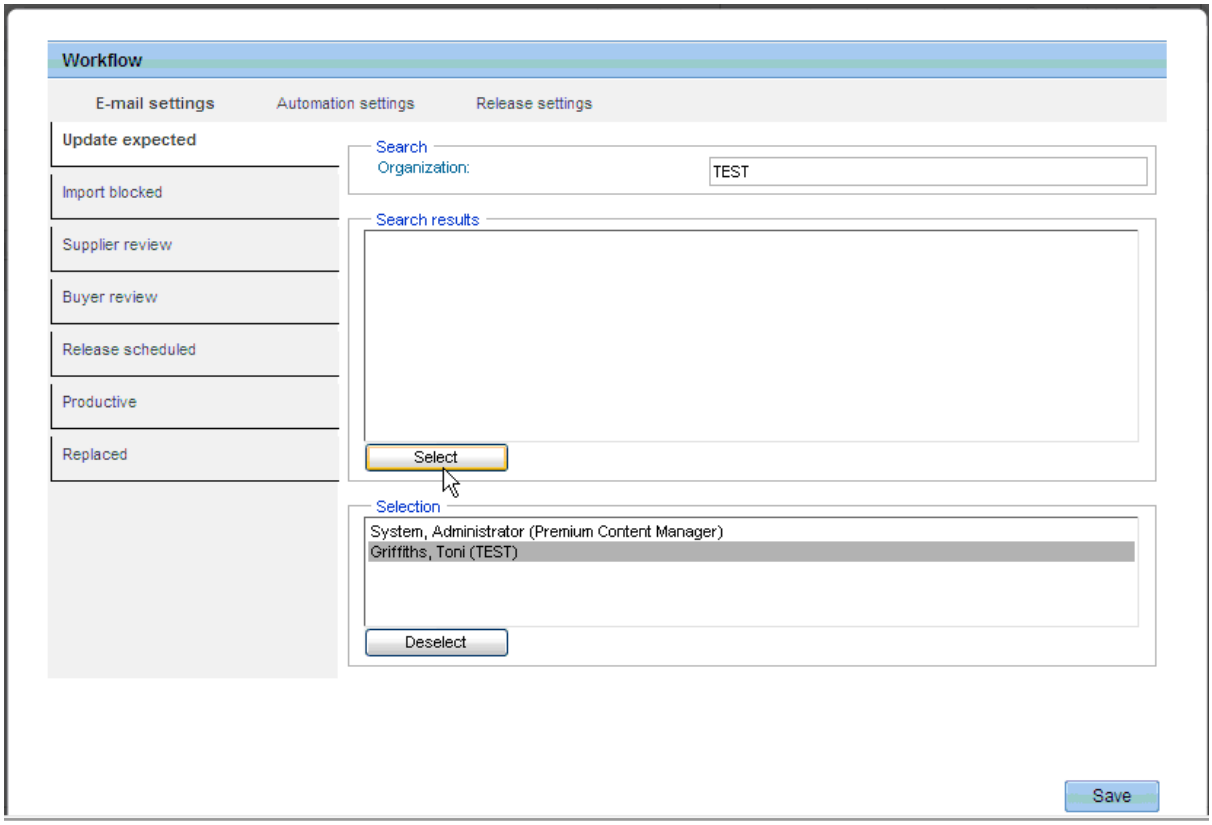
4.5.5 Configuring Catalogue Workflow

The workflow for the catalogue now needs to be configured to ensure that the necessary people from the buyer and supplier organisations are notified (by email) of catalogue changes and perform the appropriate administration duties for a particular catalogue. The workflow also determines if any steps are automated (for example supplier review in an initial load) as well as export options (such as scheduling)

Note: The person/people selected for each workflow step is used to trigger an email notification and to give permission to users to complete tasks.
Note: Workflow changes will be effective on Change of the Catalogue Status.

1. **Select the catalogue workflow option from the Links Menu:**

2. **Set up the email settings as required. Search for the relevant organisation on the top right:**



3. **Click on the relevant users and click on the select button (repeat as necessary):**

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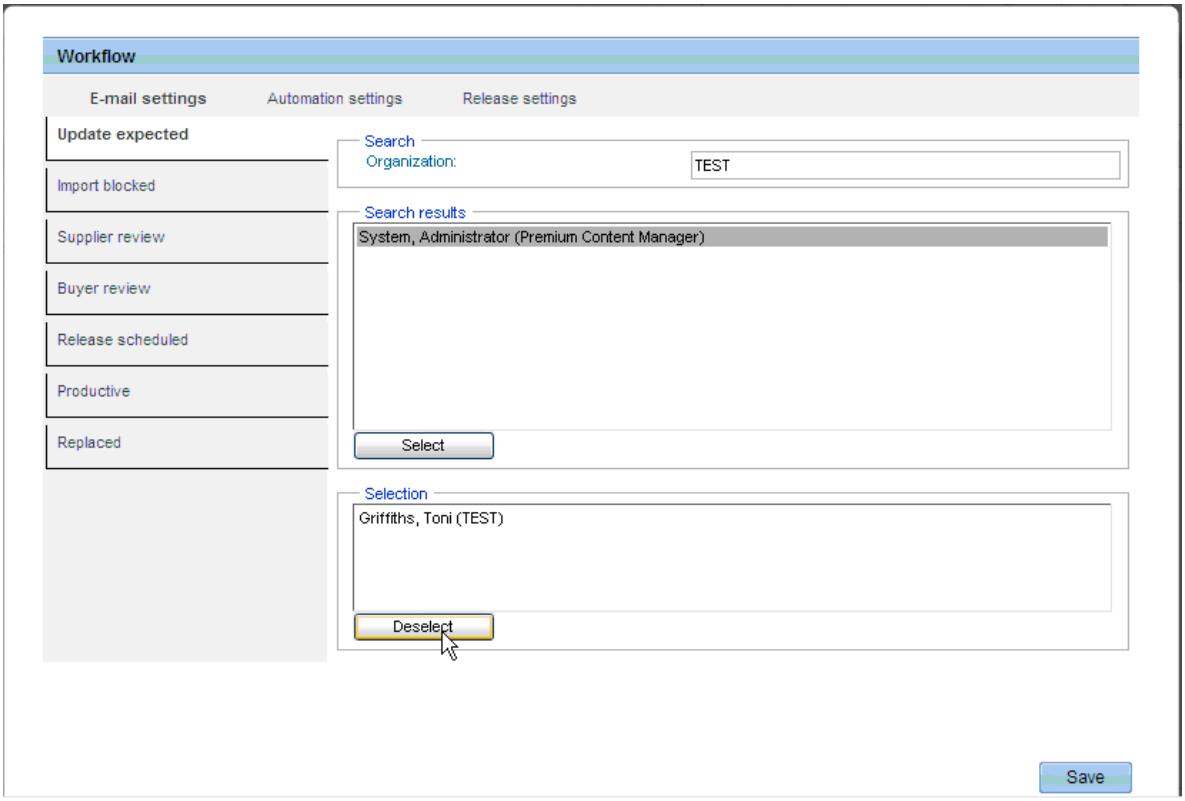
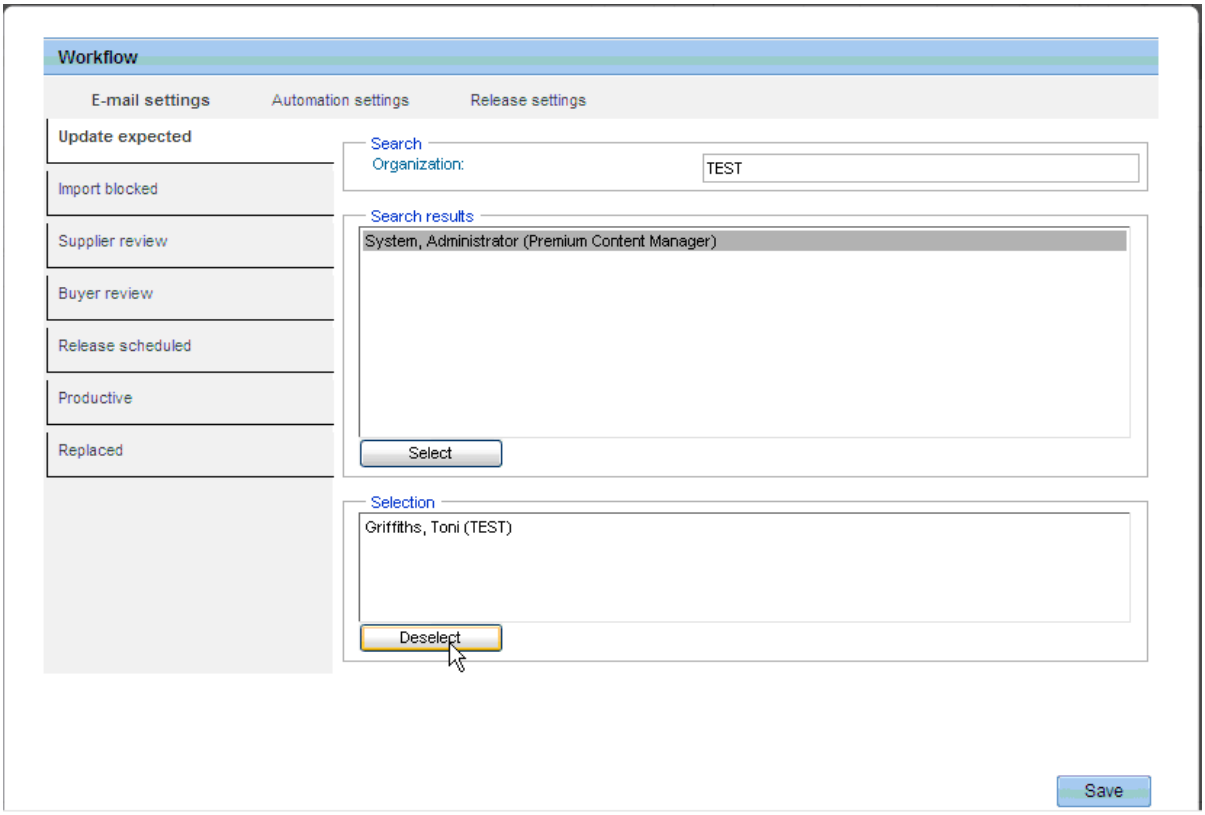


4. Click on any users within the selection that need to be removed and click on deselect (repeat as necessary):



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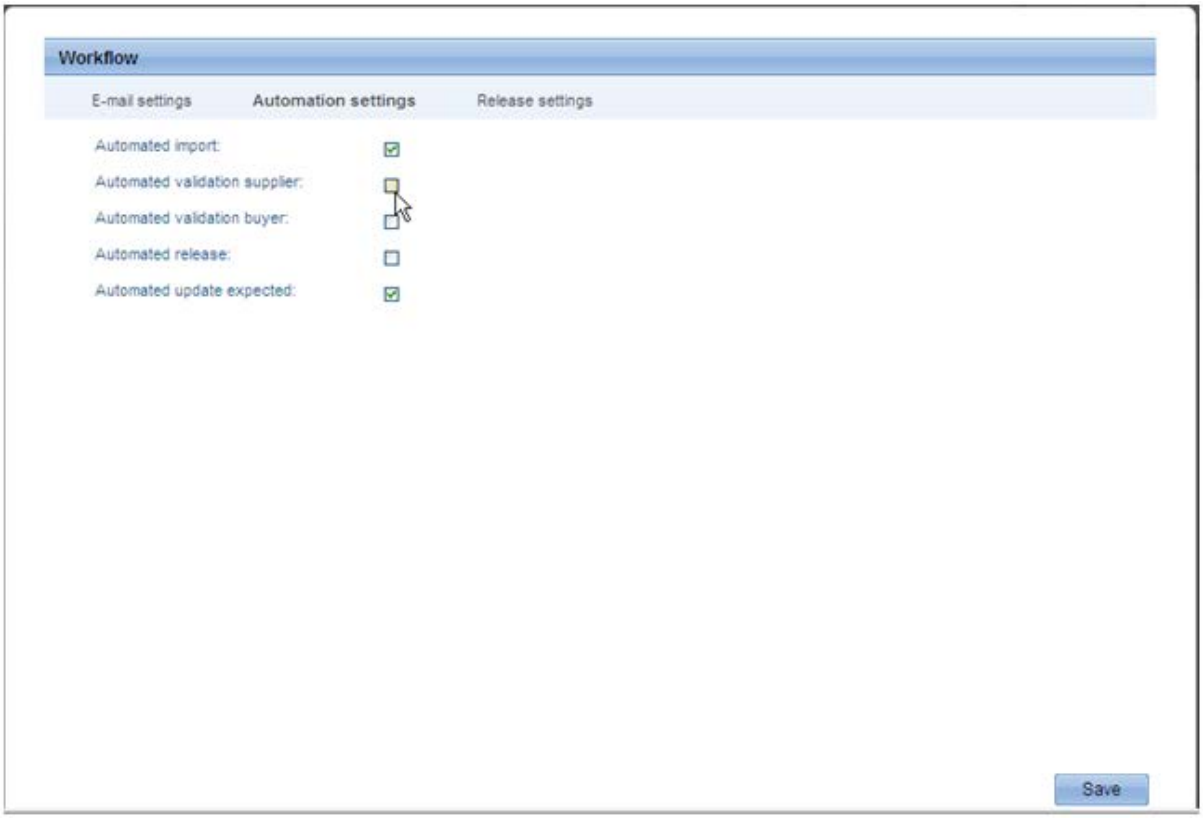
You need to set users for all 7 sections:

- Update Expected (Supplier Super User)
- Import Blocked (Supplier Super User)
- Supplier Review (Supplier Super User)
- Buyer Review (Buyer Super User)
- Release Scheduled (Buyer Super User)
- Productive (Buyer Super User)
- Replaced (Buyer Super User)

5. Click on Automation Settings and ensure that the Automation settings are set as required:



Note: Suggested setting for a standard catalogue is to deselect Automated validation supplier to enable Supplier Review status on subsequent loads

6. Check release settings are as required:

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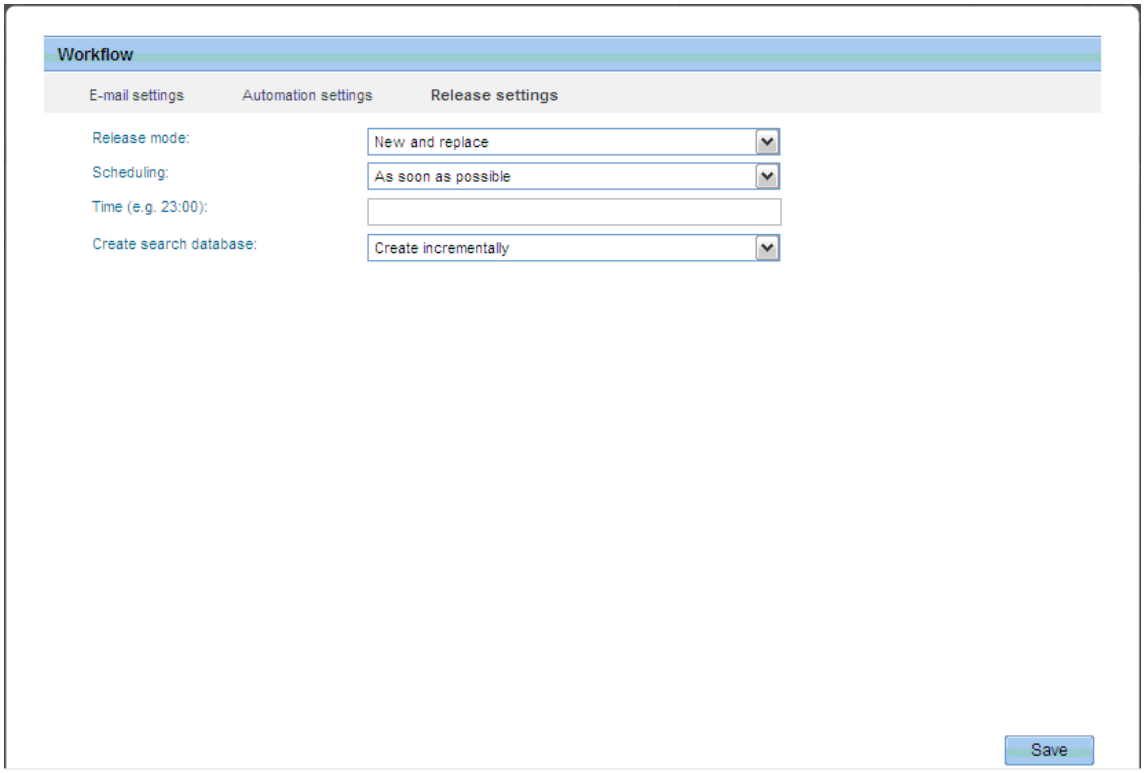

7. Click on Save on the bottom right of the pop-up window.

8. Click on close or click outside of the catalogue window.

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4.5.6 Validating your catalogue

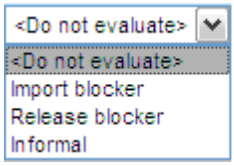
The catalogue will automatically inherit the standard validation rules that have been defined for all catalogues in your organisation. You are able to change the validations against a specific catalogue if you wish.

Note: Any changes to the validation profile will be effective immediately

1. Amending the validation profile from your standard profile

Select the validation profile icon for your catalogue from the Links Menu.

To change the evaluation against a rule, select an option from the drop down list (options vary depending on the type of rule):



To add a rule, select a similar rule and click on the "Create a new rule based on this rule" icon

Change the required details and click on save and close the pop-up.

Tip: Ensure you give the rule a meaningful name so that others can recognise what that rule checks for

Tip: Do not amend rules as this amends the rule for all catalogues and organisations on the system

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4.5.7 Adding Secondary Buying Organisations to Multi-Buyer Catalogue

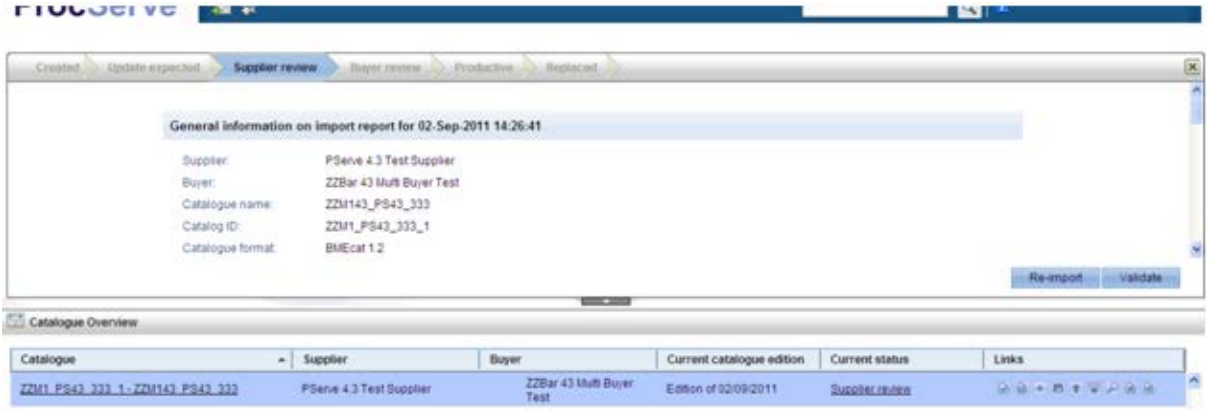
You will need to email/call the Service Desk to allow the secondary buying organisations access to the catalogue. They will add these buyers to the catalogue.

Within this email/call please include the following information:

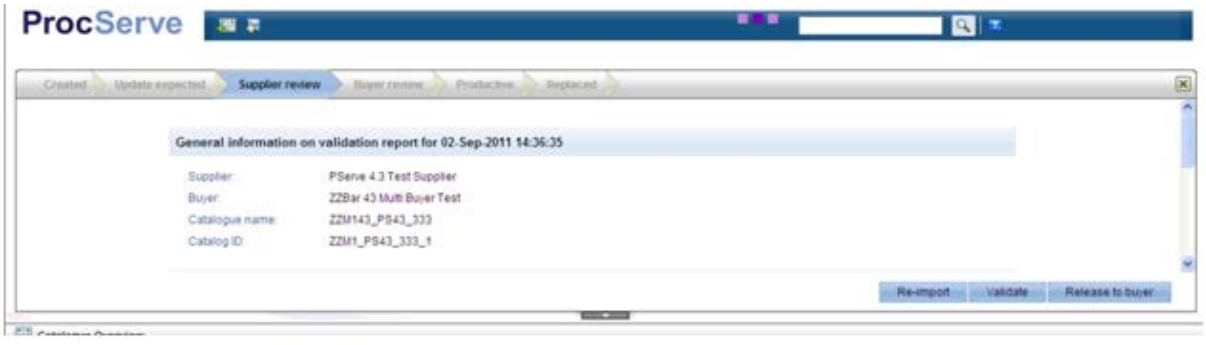
- **Your organisation name**
- **The catalogue name and ID**
- **The names of the other buying organisations**

Once the additional organisations have been added select the catalogue by clicking on it and in the top window click on the "Continue Without Import" button.

You will now need to Validate the catalogue at Supplier Review status.



You can now take the catalogue through Supplier Review and release to buyer



Price File Uploads

You should now send the Price, Contract Reference, Icon and Delivery Rule files to the secondary buying organisations who should then load, validate and confirm when this has been completed.

You should not approve or release the catalogue until all organisations have completed loading their files.

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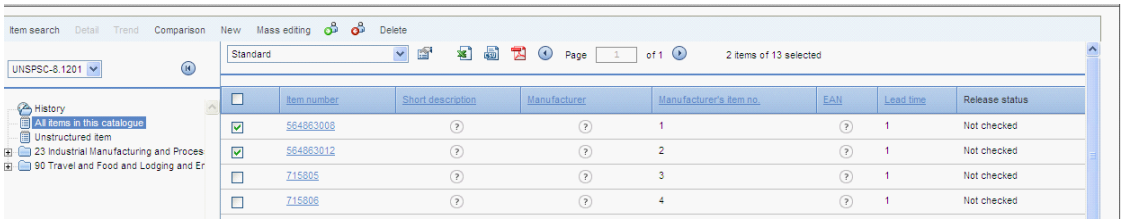
4.5.8 Approving your Catalogue

Once confirmations of uploads or Price, Contract Icon and Delivery Files has been received from secondary Buying Orgainsations you will be able to approve your catalogue.

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer from the Links Menu.

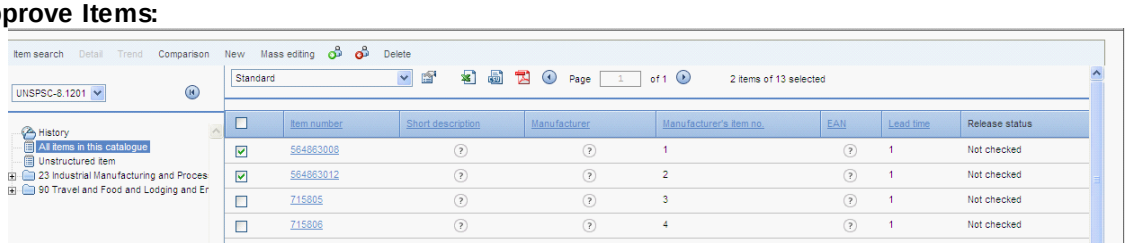


2. You can now approve and/or reject the items loaded:
Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon from the menu at the top of the page. The item is now marked for rejection.

Note: You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

Approve Items:



When you are sure that an item is correct, you can check the relevant items and click the Approve icon on the menu at the top of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

Note: If changes are required then it is recommended to make the changes in the ProcServe Catalogue Builder and re-import the file. This will ensure that your copy of the Catalogue Builder reflects the content on the system.

Note: Any new file imported will over write the old data where the header data is the same.

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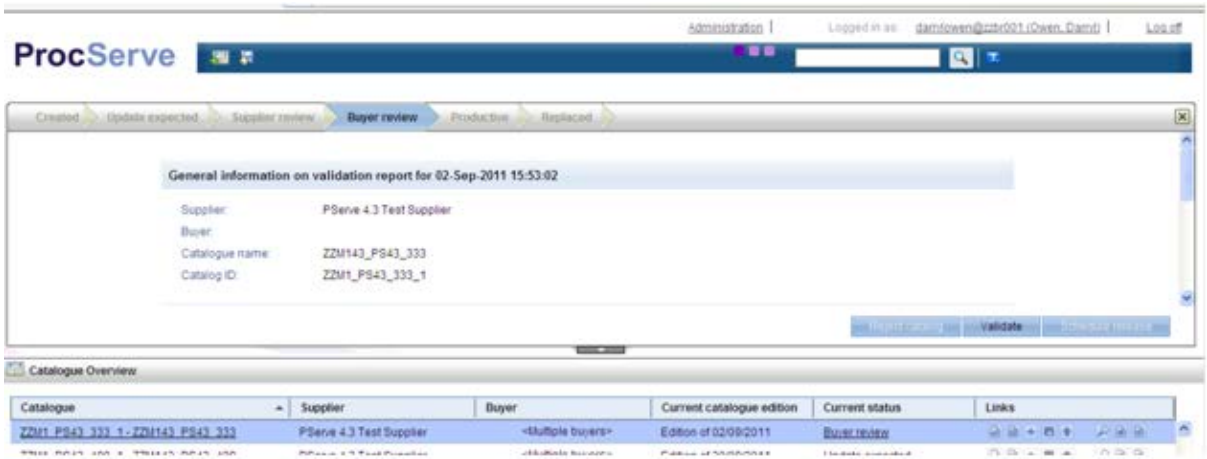
4.5.9 Buyer Review and Exporting your Multi-Buyer Catalogue

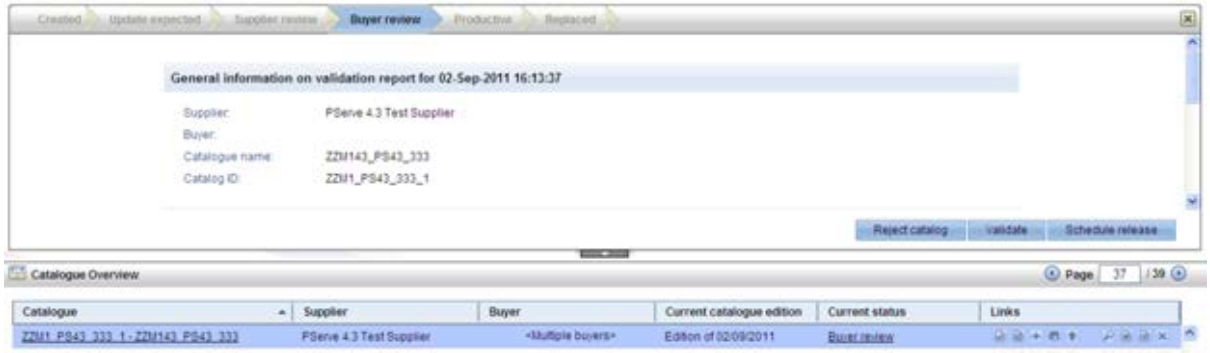
Once you have completed the above steps you now will be able to release your catalogue.

You can now validate and release your catalogue. You can complete this by searching for your Catalogue and select Validate.

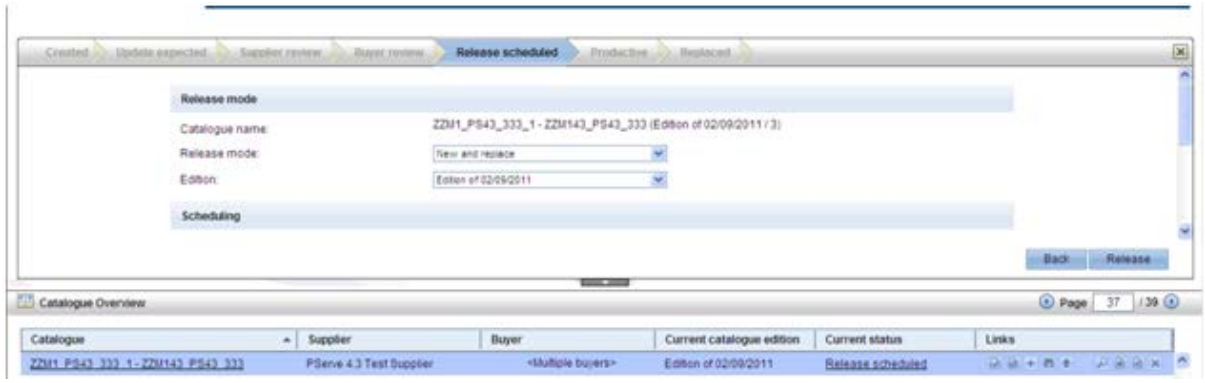


Once the Validation has run successfully, you can now Schedule Release**.**

If there are any problems returned in the Validation report, we recommend that you amend these in the Catalogue Builder and re-import.



The status will now show as Release Scheduled. Check that the release settings are correct and select Release.



Your catalogue should now export automatically by following the Export Profile you created.

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4.5.10 Secondary Buying Organisation - Loading the Additional Files

As a secondary buying organisation you will need to upload the additional files to be able to see and trade using the multi-buyer Catalogue.

1. Uploading the Additional Files:
The price file and, if required, the contract reference, delivery charge and icon files must be uploaded by each buying organisation before exporting the catalogue to the Marketplace.

There are two options:

Option 1. Where you are operating on behalf of other buying organisations:
You should access each account as a buyer contract manager for each organisation and upload as directed below.

Option 2. If you are not operating on behalf of other buying organisations:
You should send the relevant files to all of your buying organisations and direct them to upload as below.

2. Upload the price file in Catalogue Manager:
Navigate **to the catalogue by searching for the catalogue name.**

Note: Loading Price Files with Price Effective Date and Price Expiry Date:

When loading Price files which have a Price Effective and Price Expiry Date care should be taken not to load these files with a Price Effective Date which is in the past. The main catalogue will load as normal and will not give an error.

In the Price File example below (where it is being loaded on 08//02/2011):

Item Number	Amount	Lowerbound	Price Effective Date	Price Expiry Date	
Item ID1001	10.20	1	01/04/2011	30/07/2011	✓
Item ID1002	5.35	1	08/02/2011	30/07/2011	✓
Item ID1003	7.50	1	**01/11/2010**	30/07/2011	×
Item ID1004	11.00	1	08/02/2011	30/07/2011	✓

Item ID1001	Future date. Item will be available to buy from this date.
Item ID1002	Current date. Will be available immediately
Item ID1003	Past date. May give an error when loading Price File.
Item ID1004	Current date. Will be available immediately

Before loading the Price File, the Price Effective Date should be changed to the current date or the date when the Price File will be loaded. It is easier to do this if the Price File is sorted in Ascending order on the Price Effective Date. Any dates in the past will be shown near the top and can be amended quickly.

Item Number	Amount	Lowerbound	Price Effective Date	Price Expiry Date	
Item ID1001	10.20	1	01/04/2011	30/07/2011	✓
Item ID1002	5.35	1	08/02/2011	30/07/2011	✓
Item ID1003	7.50	1	**08/02/2011**	30/07/2011	✓
Item ID1004	11.00	1	08/02/2011	30/07/2011	✓

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3. Select the Catalogue from the list of results and select the Data Upload Icon from the Links Menu.

5. The Data Upload page is displayed.

6. Leave the Excel option checked.

7. Select the relevant Schema/s:

Price List	If you are uploading a price list select Price List (Item Price) from the Schema list.
Contract Reference	If you are uploading a contract reference list select Contract Reference (Buyer Extension) from the Schema list.
Delivery Charge	If you are uploading a delivery charge file select Delivery Charge (Buyer-Specific Extensions) from the Schema list.
Icons File	If you are uploading a icons file select Icons (Buyer-Specific Extensions) from the Schema list.

8. Click the Browse button:
A dialogue is displayed. Locate and select the relevant file and click the upload button.

9. Repeat this process until all required files have been uploaded.
You can do this by selecting Data upload from the top left of the pop-up

10. Exit out of the Data Upload Screen by selecting Close at the bottom of the window or clicking your mouse on the dark area of the page.

11. You should now run a validation on the catalogue by selecting Validate.

Once the Price and Contract Reference files have been loaded and validated the secondary Buying Organisations should notify the lead buying organisation so they can schedule the release of the catalogue.

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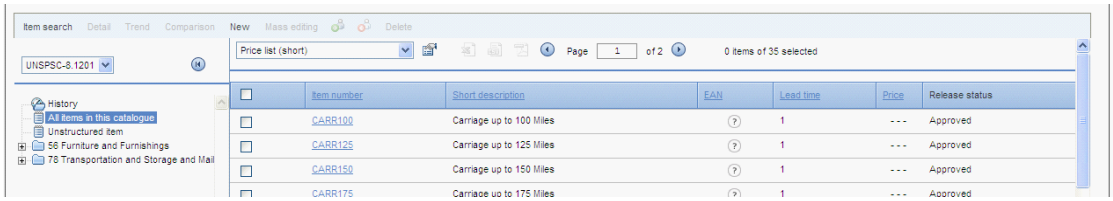
4.5.11 Changing the buyer in List Properties

Changing the buyer in List Properties in order to download the correct price file

1. Select the catalogue

2. Click on Catalogue Explorer from the Links menu

3. Change the drop down from Standard to Price list (Short) and click on the icon next to this drop down



4. A pop up window will appear in which you can make further settings for the items' list presentation

5. Click on the Buyer Drop Down box to change the buyer.

6. Click ok to view the other buyers item prices and to download the lead buyers price list.

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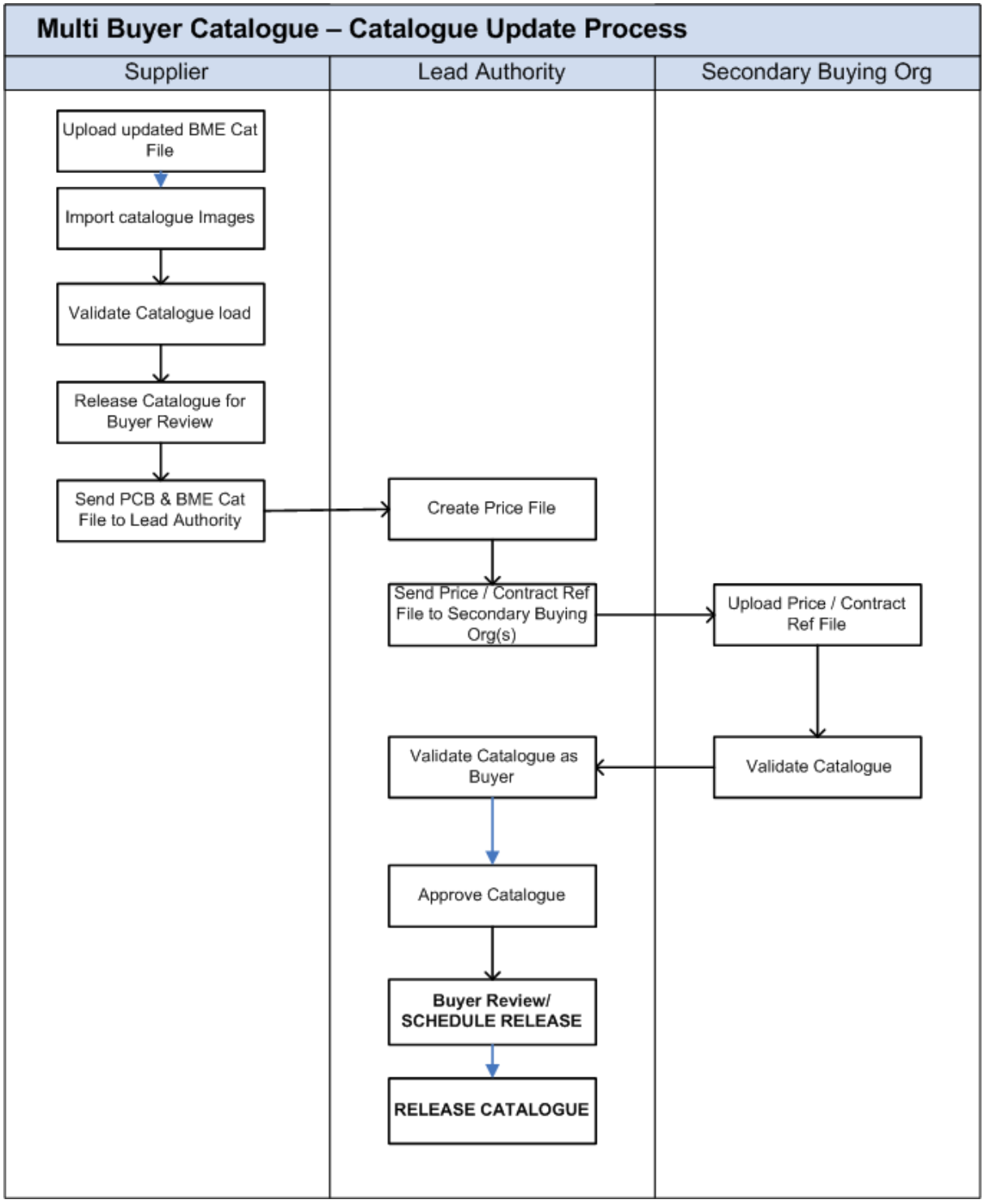
4.6 Multi-Buyer Catalogue - Catalogue Update Process

4.6.1 Overview

Overview

This section describes the process of updating a Multi-Buyer catalogue.


Multi Buyer Catalogue – Catalogue Update Process
Supplier
Lead Authority
Secondary Buying Org
Upload updated BME Cat File
Import catalogue Images
Validate Catalogue load
Release Catalogue for Buyer Review
Send PCB & BME Cat File to Lead Authority
Create Price File
Send Price / Contract Ref File to Secondary Buying Org(s)
Upload Price / Contract Ref File
Validate Catalogue as Buyer
Validate Catalogue
Approve Catalogue
Buyer Review/ SCHEDULE RELEASE
RELEASE CATALOGUE

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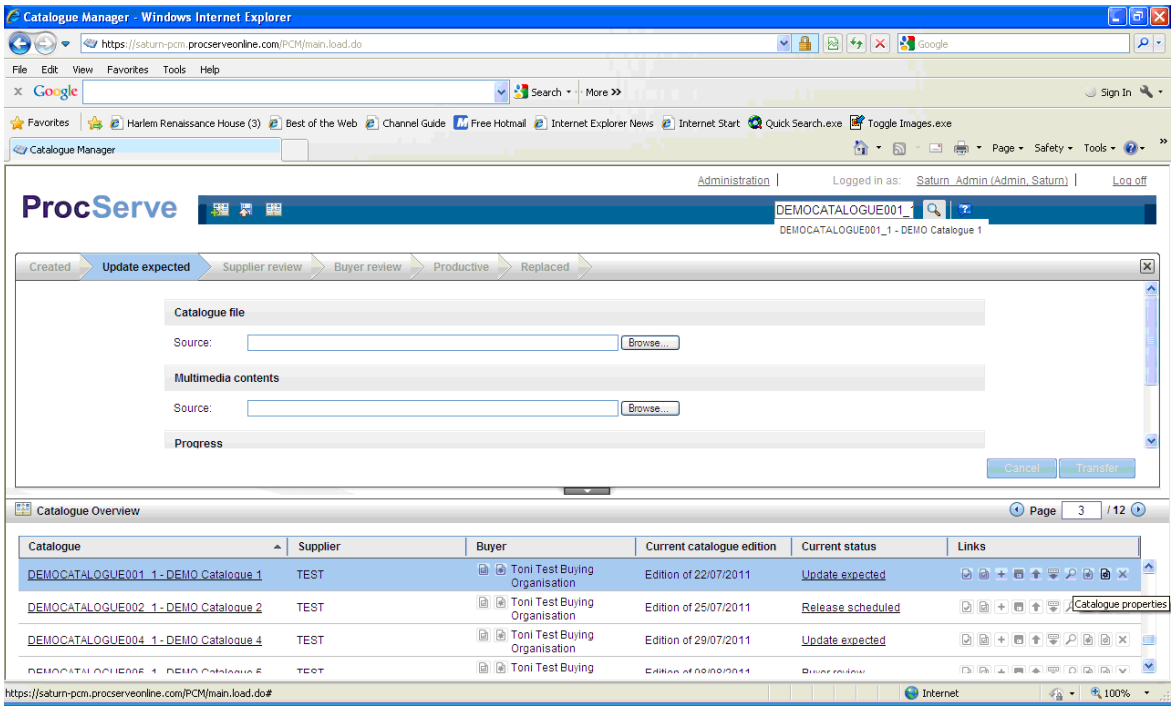
4.6.2 Importing the Updated Catalogue

The following steps should be completed by the supplier:

1. Navigate Admin Menu >> Catalogue Management.

2. The Catalogue Manager is displayed. Select the Catalogue by clicking on either the name or the status of the catalogue. The actions that can be completed at this stage will be available.



3. Import BMECat File. Click the browse button on the catalogue file path:

Note: You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.

4. Click the Transfer button on the right.

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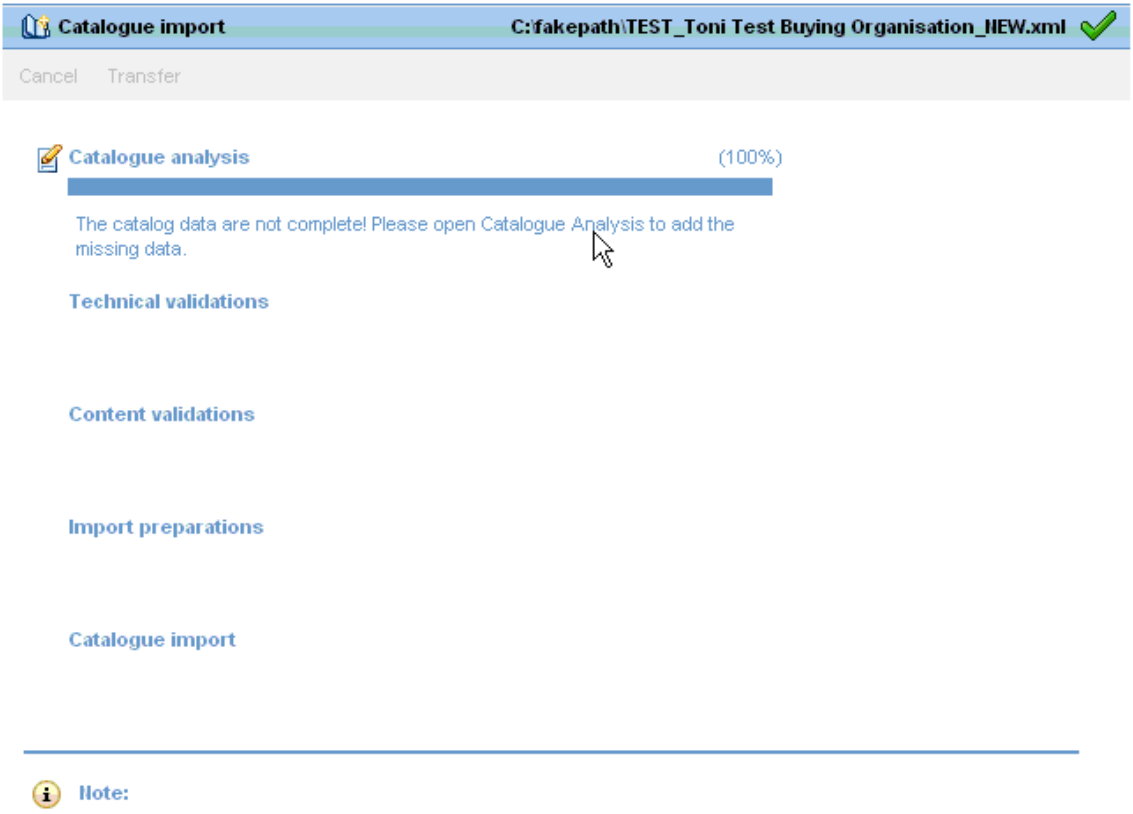

5. The Summary page is displayed:

6. Once the import has successfully completed the confirmation screen is displayed:

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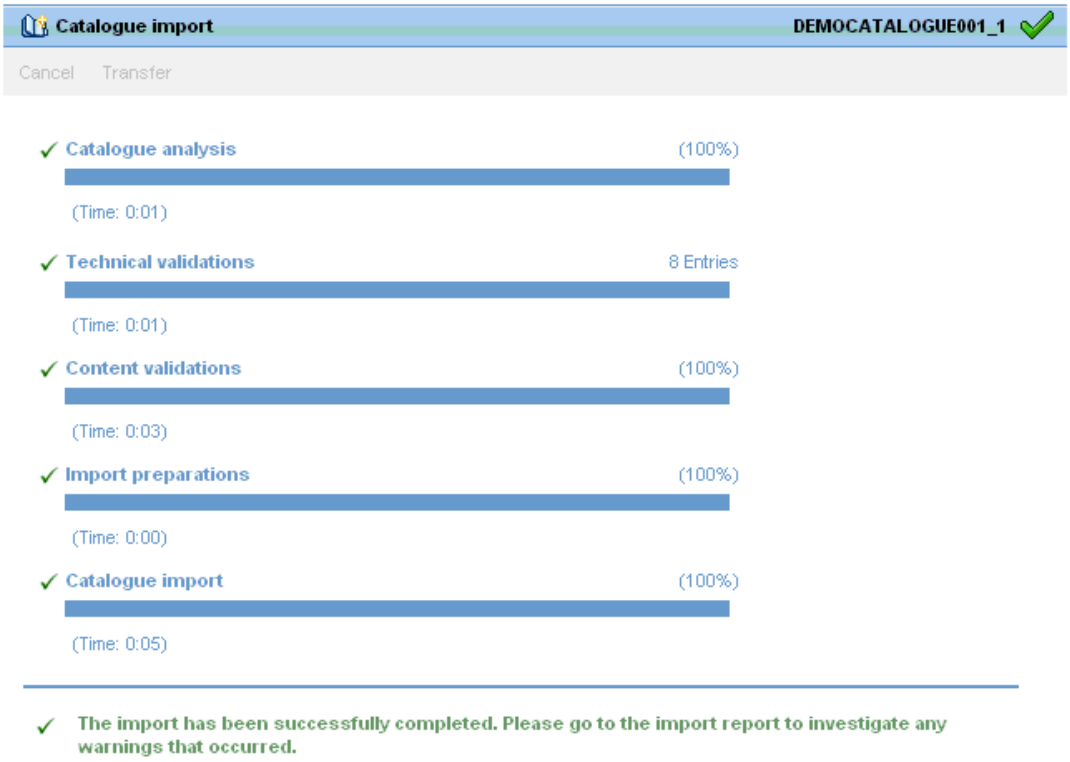
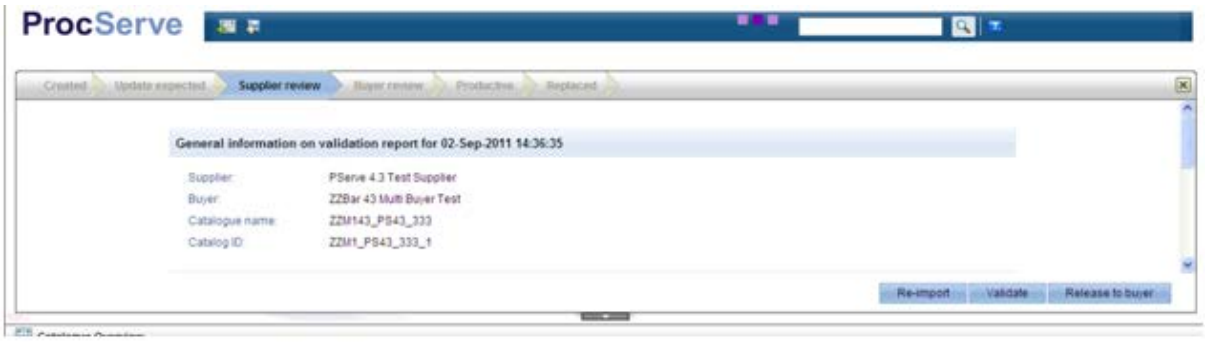


7. Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen

Note: Depending on the workflow configured for this catalogue, the catalogue will now go to Supplier Review. An email will be sent to the nominated supplier user to prompt them to complete this.



8. Buyer Review: Once a supplier has performed the upload they will release the catalogue to Buyer Review. The ProcServe Catalogue Manager System will automatically email the users listed in the Buyer Review section of this catalogues workflow so the next stage of the process can be completed.

9. Once the Buyer has Validated the catalogue, they should send the price and other files to the secondary buying organisations to load.

Do not approve or release the catalogue until all secondary buying organisations have completed uploading their files.

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4.6.3 Creating a Price File and Contract Ref File

Each secondary buying organisation that requires access to a multi buyer catalogue will need to load price and contract reference files. The Price File should be created by the lead buying organisation by either downloading from the ProcServe Catalogue Manager or by using the ProcServe Catalogue Builder that the supplier completed.

Note: Suppliers that use Price Breaks in their catalogue will need to send their catalogue Builder to the lead organisation to allow them to create the price files incorporating Price Breaks. You cannot download Price Break information from the ProcServe Catalogue Manager.

To create the files you need to copy data from the ProcServe Catalogue Builder into another spreadsheet - the price / contract reference template files. This will ensure you have captured all the relevant data including any price breaks.

For the latest price file and contract reference templates please contact the ProcServe service desk.

The below tables highlight which columns data is copied from and pasted into.

Creating a Price File from the ProcServe Catalogue System

Price File Templates are available from the ProcServe Service Desk.

The below table shows how you can create a Price File from the available reports in Catalogue Explorer. By changing the drop down option and selecting the reports highlighted below you can run each report and create the Price File.

Please note you will have to select all items to enable the Excel button in order to generate the report.

Report	Column within Report	Price file template column name
Price List Detailed	Item number	Item Number
Price List Detailed	Price Quantity	Amount
Order Information	Minimum Order Quantity	LowerBound
Price List Detailed	Valid From	Price Effective Date
Price List Detailed	Valid To	Price Expiry Date

Creating a Price File from the ProcServe Catalogue Builder

To create the files copy data from the ProcServe Catalogue Builder into the price / contract reference template files. This will ensure you have captured all the relevant data including any price breaks.

The below table shows you which columns in the ProcServe Catalogue Builder relate to the price file Template columns.

PCB column name	Price file template column name
Supplier Item ID	Item Number

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Unit Price	Amount
Minimum Order Quantity	LowerBound
Price Effective Date	Price Effective Date
Price Expiry Date	Price Expiry Date

Creating a Contract Reference File from the ProcServe Catalogue Builder

Contract Reference Templates are available from the ProcServe Service Desk

If the Contract reference is used in the ProcServe Catalogue Builder the Buying Organisation can create a contract reference file

The below table shows you which columns in the ProcServe Catalogue Builder relate to the contract reference File columns.

PCB column name	Contract ref file template column name
Supplier Item ID	Item Number
Contract Reference	Contract Reference

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4.6.4 Secondary Buying Organisation - Loading the Price and Contract Files

The secondary buying organisation will need to upload a price file and contract reference file to be to buy from the multi-buyer catalogue

1. Uploading the Additional Files:
The price file and, if required, the contract reference, delivery charge and icon files must be uploaded and validated by each buying organisation before exporting the catalogue to the Marketplace.

There are two options:

Option 1. Where you are operating on behalf of other buying organisations:
You should log in as a buyer super user for each organisation and upload as directed below.

Option 2. If you are not operating on behalf of other buying organisations:
You should notify all of your buying organisations and direct them to upload as below.

2. Upload the price file in Catalogue Manager. Navigate to the catalogue by searching for the catalogue name.

Note: Loading Price Files with Price Effective Date and Price Expiry Date

When loading Price files which have a Price Effective and Price Expiry Date care should be taken not to load these files with a Price Effective Date which is in the past. The main catalogue will load as normal and will not give an error.

In the Price File example below (where it is being loaded on 08//02/2011):

Item Number	Amount	Lowerbound	Price Effective Date	Price Expiry Date	
Item ID1001	10.20	1	01/04/2011	30/07/2011	✓
Item ID1002	5.35	1	08/02/2011	30/07/2011	✓
Item ID1003	7.50	1	**01/11/2010**	30/07/2011	×
Item ID1004	11.00	1	08/02/2011	30/07/2011	✓

Item ID1001	Future date. Item will be available to buy from this date.
Item ID1002	Current date. Will be available immediately
Item ID1003	Past date. May give an error when loading Price File.
Item ID1004	Current date. Will be available immediately

Before loading the Price File, the Price Effective Date should be changed to the current date or the date when the Price File will be loaded. It is easier to do this if the Price File is sorted in Ascending order on the Price Effective Date. Any dates in the past will be shown near the top and can be amended quickly.

Item Number	Amount	Lowerbound	Price Effective Date	Price Expiry Date	
Item ID1001	10.20	1	01/04/2011	30/07/2011	✓
Item ID1002	5.35	1	08/02/2011	30/07/2011	✓
Item ID1003	7.50	1	**08/02/2011**	30/07/2011	✓
Item ID1004	11.00	1	08/02/2011	30/07/2011	✓

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3. Select the Catalogue from the list of results and select the Data Upload Icon from Links.

5. The Data Upload page is displayed.

6. Leave the Excel option checked.

7. Select the Schema:

Price List	If you are uploading a price list select Price List (Item Price) from the Schema list.
Contract Reference	If you are uploading a contract reference list select Contract Reference (Buyer Extension) from the Schema list.
Delivery Charge	If you are uploading a delivery charge file select Delivery Charge (Buyer-Specific Extensions) from the Schema list.
Icons File	If you are uploading a icons file select Icons (Buyer-Specific Extensions) from the Schema list.

8. Click the Browse button:
A dialogue is displayed. Locate and select the relevant file and click the upload button.

9. The file is uploaded
When the upload is complete a message containing an upload summary is displayed. Repeat this process until all required files have been uploaded. You can do this by selecting Data upload from the top left of the pop-up.

10. Exit out of the Data Upload Screen by selecting Close at the bottom of the window or clicking your mouse on the dark area of the page.

11. You should now run a validation on the catalogue by selecting Validate.

Once the Price and Contract Reference files have been loaded and validated the secondary Buying Organisations should notify the lead buying organisation so they can schedule the release of the catalogue.

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4.6.5 Lead Organisation - Approving your Catalogue

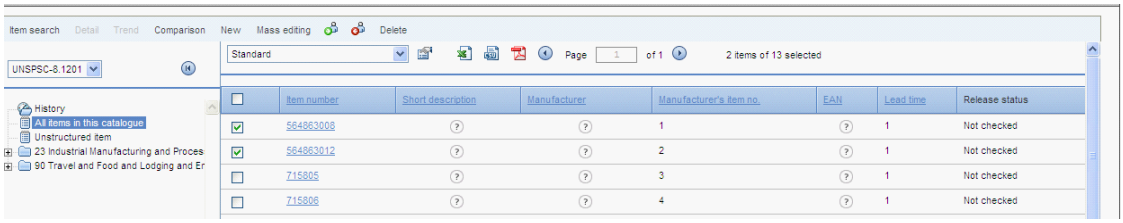
The lead buying organisation will perform the task of approving the catalogue.

Buyer Review: Approving the Catalogue

The buyer review is now required. The buyer contract manager will need to check and then approve the items / catalogue.

To approve the items in the catalogue the buying organisation will need to approve them in Catalogue Explorer.

1. Select Catalogue Explorer from the Links Menu.

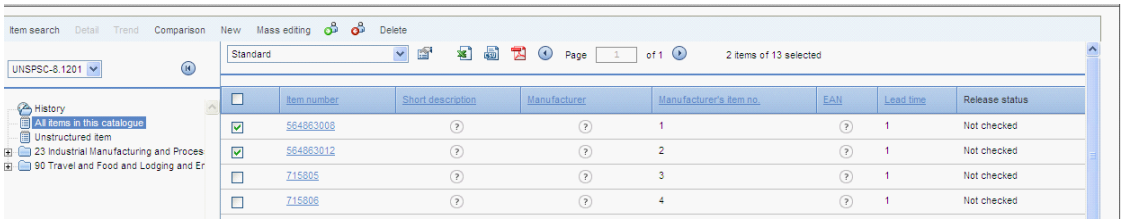


2. Approve and/or reject the items loaded:
Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon at the top of the page. The item is now marked for rejection.

Note: If any items are rejected, the Supplier should be advised accordingly.

Approve Items:



Items that need to be approved should be selected and approved using the Approve icon at the top of the page.

Tip: If you wish to view an item's detail, click the Item number link to display the item details.

Tip: You can approve items one at a time or you can click the left hand column heading box to select all items.

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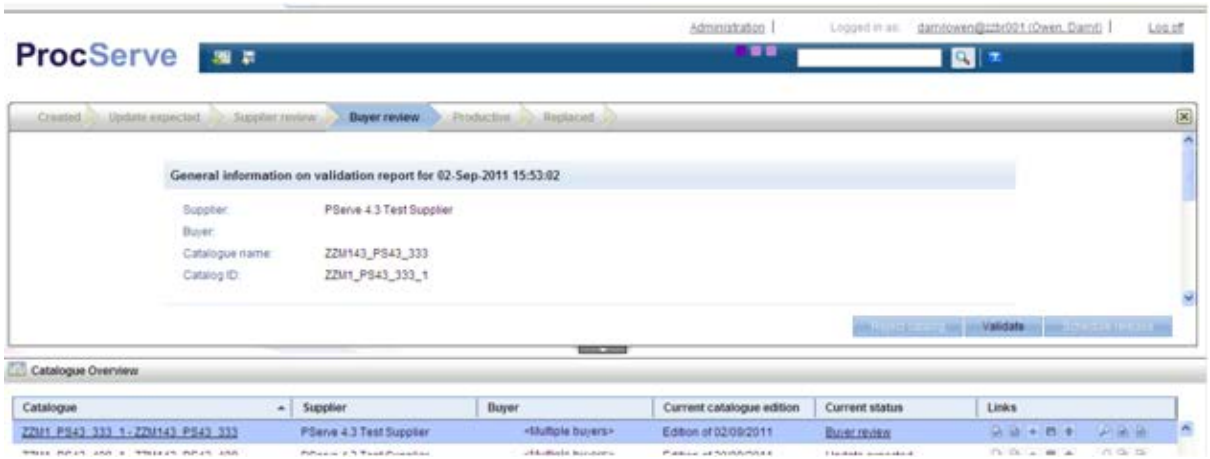
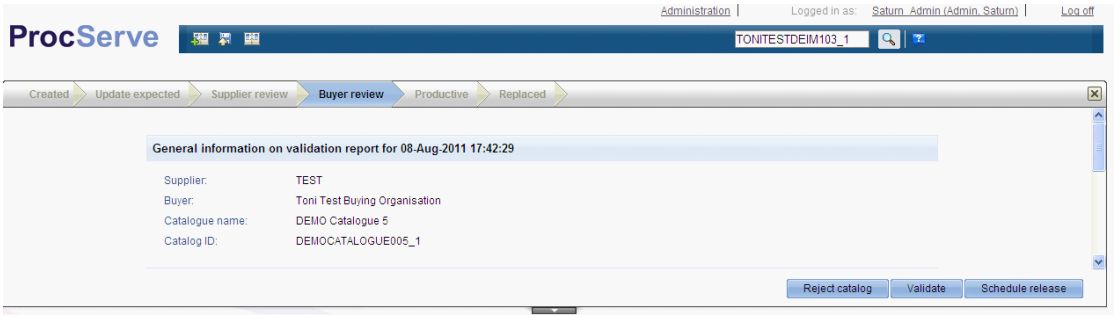
4.6.6 Exporting your Multi-Buyer Catalogue

You can now validate and release your catalogue. You can complete this by searching for your Catalogue and select Schedule Release in the Catalogue Overview window.

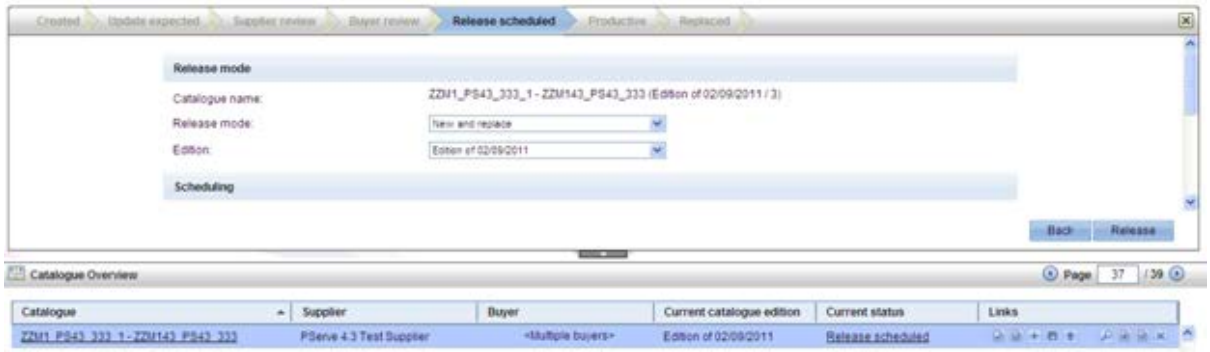
Select Validate



Once the Validation has run successfully, you can now Schedule Release**.**



The status will now show as Release Scheduled. Check that the release settings are correct and select Release.



Your catalogue will now export and change to the status Update Expected.

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5
Managing Classification Views

5 Managing Classification Views

5.1 Managing Classification Views Overview

This section describes how to create and manage classification views.

Note: If your buying organisation is using xchangewales for shopping and transactions then Classification views need creating in the marketplace and in xchangewales.

Classification views are created to allow a buyer to see only selected UNSPSC classifications and or supplier catalogues.

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5.2 Adding a new Classification View

Overview

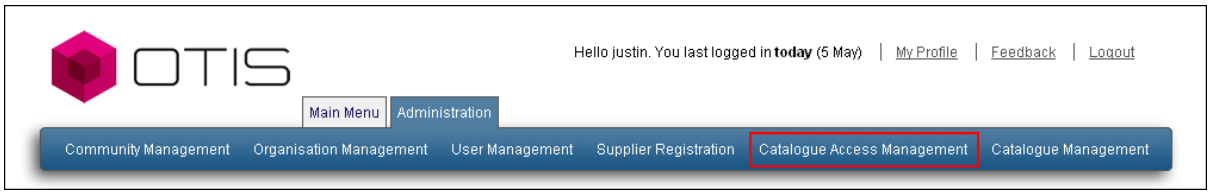
This section describes how to create and manage classification views. In the marketplace you administer the catalogue content of the classification view where as in xchangewales you administer what classification views an organisation and its user has access too.

Adding a new Classification View to the marketplace

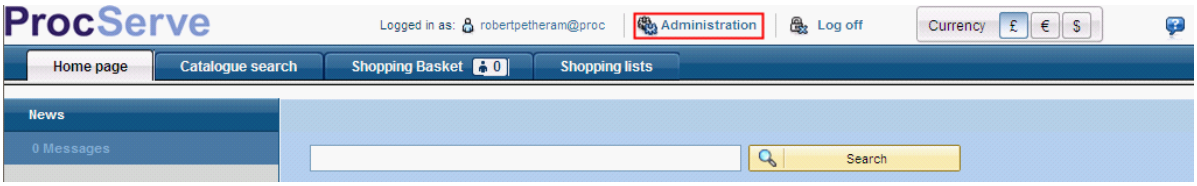
1. Login to xchangewales

2. Click on 'Administration'

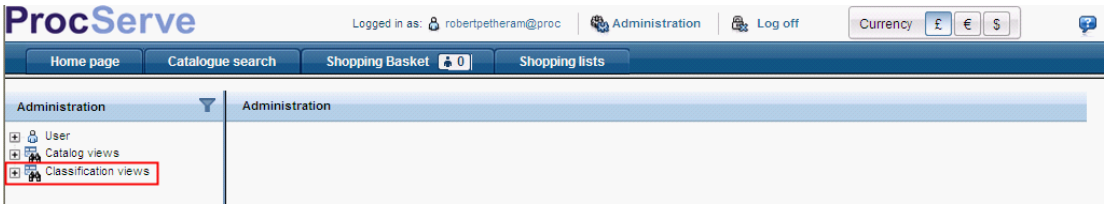
3. Click on 'Catalogue Access Management'



A new window will open and the Catalogue Home page is displayed:



4. Open Administration Module
Click the Administration link as indicated in the above image. The Administration module is displayed:



Note: You need special permissions to view the Administration module and some of it's contents. If you cannot access the administration module and need to work with Classification views please contact your service support team.

5. Navigate Classification Views >> Your Organisation

To create a new classification view expand the classification views option in the left hand pane. Then select the organisation name, this will open a list of the existing views and the option on the right hand side of the screen to create a new view which should be selected.

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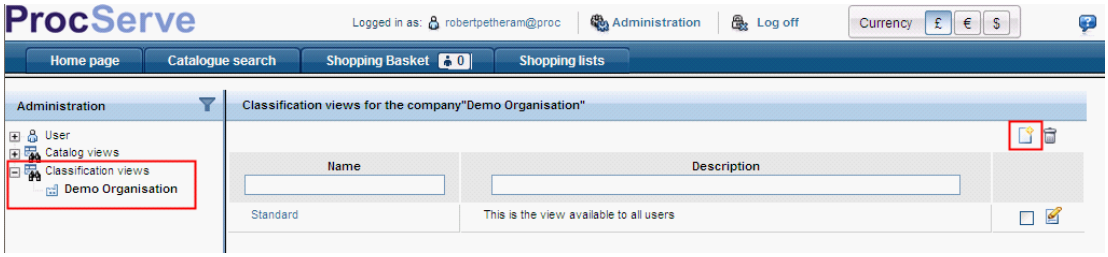
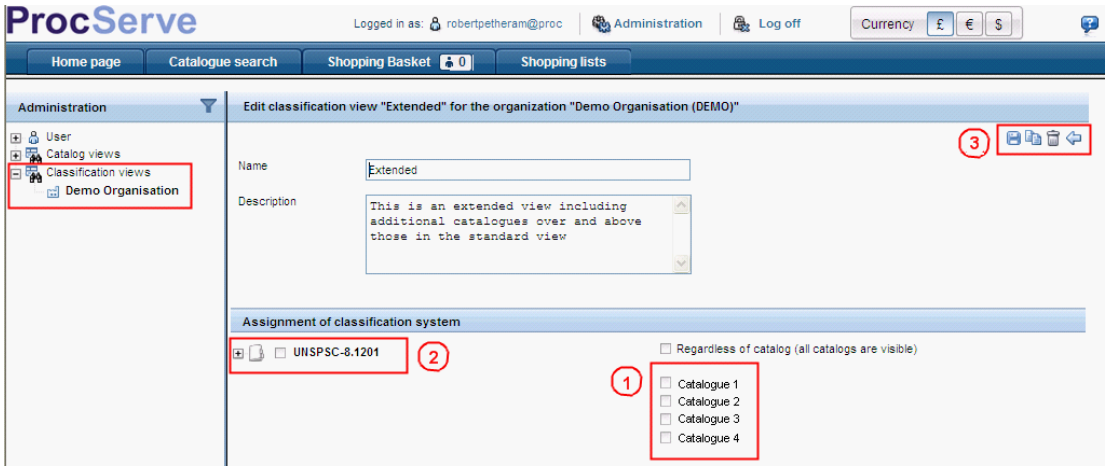


6. Enter a name and a description for the Classification view and click the Save icon:

For example:

7. Add the required catalogues to the view



The following list describes how you use the above page to add classifications to your view:

(1) Catalogue Selection:
You can check one or more catalogues to make available in this view, for example

(2) Select Classification Groups:
You use the UNSPSC tree to locate and select classes to add to your view, for example:

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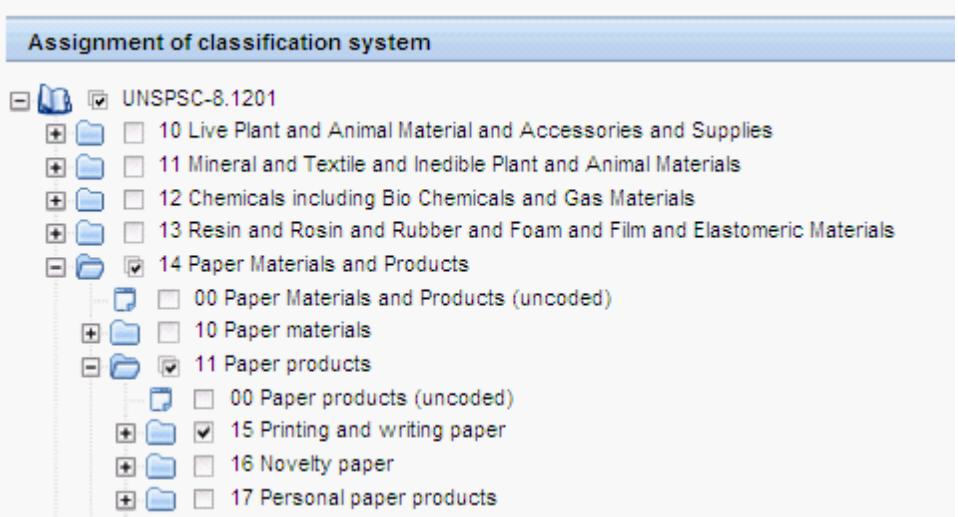
Assignment of classification system
UNSPSC-8.1201
10 Live Plant and Animal Material and Accessories and Supplies
11 Mineral and Textile and Inedible Plant and Animal Materials
12 Chemicals including Bio Chemicals and Gas Materials
13 Resin and Rosin and Rubber and Foam and Film and Elastomeric Materials
14 Paper Materials and Products
00 Paper Materials and Products (uncoded)
10 Paper materials
11 Paper products
00 Paper products (uncoded)
15 Printing and writing paper
16 Novelty paper
17 Personal paper products

You will also need to either set the catalogue selection to specific catalogues or “Regardless of catalog”

8. When complete click the save icon (3) and exit the marketplace

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5.3 Administering Existing Classification Views

Overview

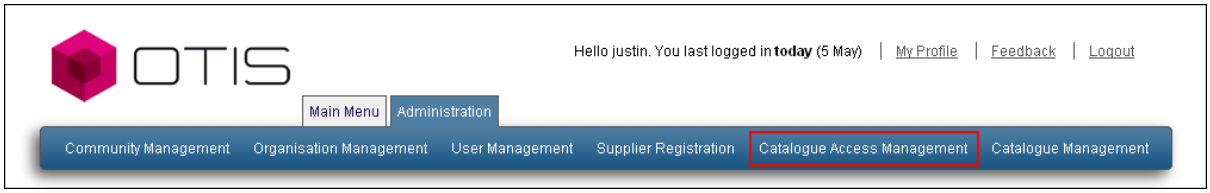
This section describes how you can amend classification views in the marketplace.

Administering Classification Views

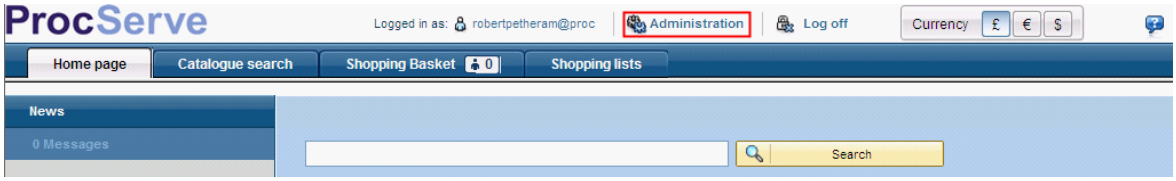
1. Login to xchangewales

2. Click on 'Administration'

3. Click on 'Catalogue Access Management'

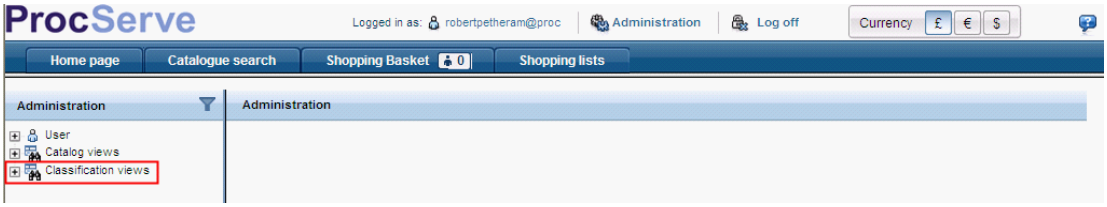


A new window will open and the Catalogue Home page is displayed:



4. Open Administration Module

Click the Administration link as indicated in the above image. The Administration module is displayed:



Note: You need special permissions to view the Administration module and some of it's contents. If you cannot access the administration module and need to work with Classification views please contact your service support team.

5. Click on a Classification View to administer

To work with existing views you locate your organisation name in the tree and select. Details of existing classification views are loaded into the page shown below. You can delete or change existing views from here, the icon highlighted below is selected to change the corresponding view.

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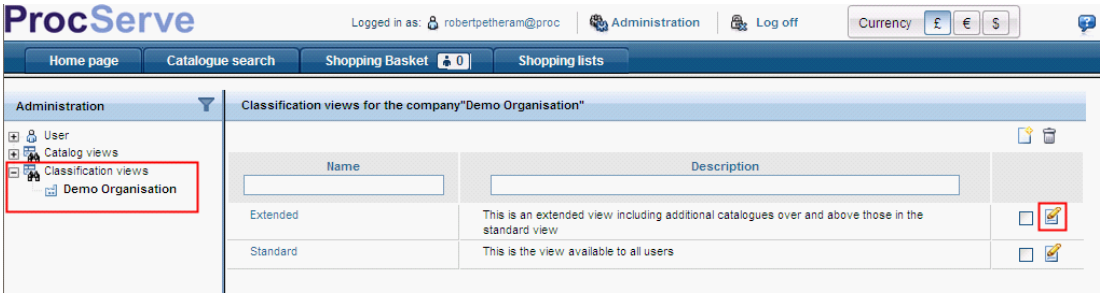
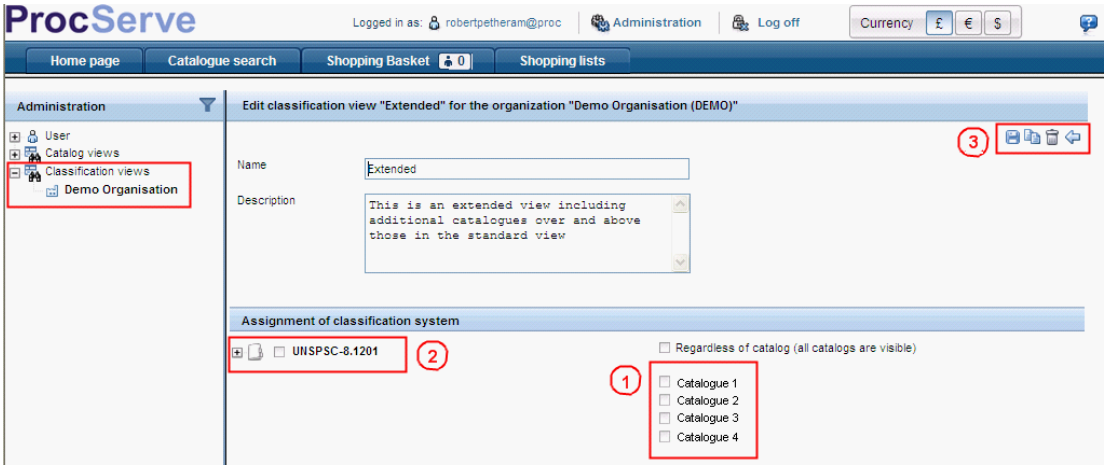
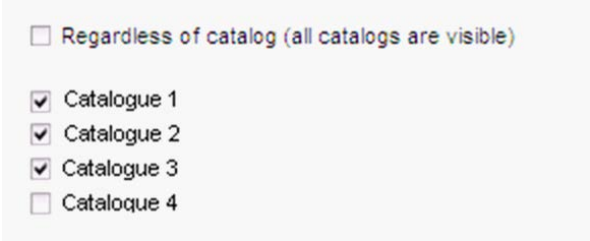


The following list describes how you use the above page to add or remove catalogues to your view:



(1) Catalogue Selection:
You can check one or more catalogues to make available in this view or alternatively uncheck a catalogue to remove it from the view:



(2) Select Classification Groups:
You use the UNSPSC tree to locate and select or remove classes to add to your view, for example:

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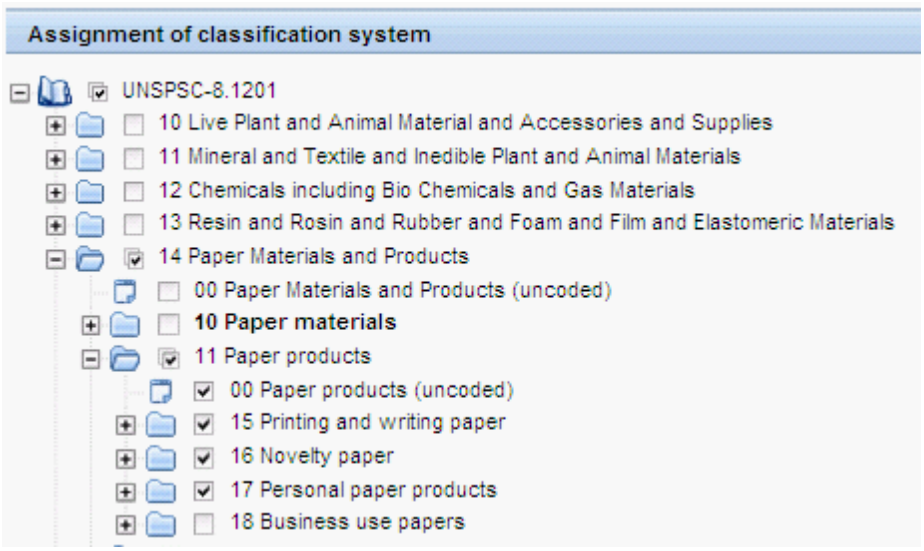
Assignment of classification system
UNSPSC-8.1201
10 Live Plant and Animal Material and Accessories and Supplies
11 Mineral and Textile and Inedible Plant and Animal Materials
12 Chemicals including Bio Chemicals and Gas Materials
13 Resin and Rosin and Rubber and Foam and Film and Elastomeric Materials
14 Paper Materials and Products
00 Paper Materials and Products (uncoded)
10 Paper materials
11 Paper products
00 Paper products (uncoded)
15 Printing and writing paper
16 Novelty paper
17 Personal paper products
18 Business use papers

8. When complete click the save icon (3)

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5.4 Updating the Search Index

Overview

This section describes how the search index updates once you have removed or changed a classification linked to a user.

Removing a View

Currently, when a classification is removed from a users view, the user will still be able to locate a removed item until the search index is rebuilt over night. The 'Checkout' button however will be removed so a user can not request those items.

Should a catalogue need removing urgently, the classification view can be taken away from the user and that catalogue can be re-exported using **Create Incrementally**. The function will only work for Private or Multibuyer catalogues.

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6
Additional Information

6 Additional Information

6.1 About DUNS

A DUNS Number is a nine-digit code assigned by Dun & Bradstreet to identify unique business's separate and distinct operations.

There is no charge to obtain a D&B DUNS number for your business and it can make it easier for your customers to do business with you.

You can apply for a unique DUNS number on the Dun & Bradstreet website at: http://dbuk.dnb.com/Forms/DUNS_Request.asp

If you do not have one central sales order processing site, you will need to obtain a separate DUNS number for each ordering location. In this event, and to avoid misunderstanding, please check with your head office to determine which, (if any), DUNS number may have already been allocated.

The process for application to Dun & Bradstreet should take no longer than two weeks. You may wish to apply now if your Organisation does not already have a DUNS Number.

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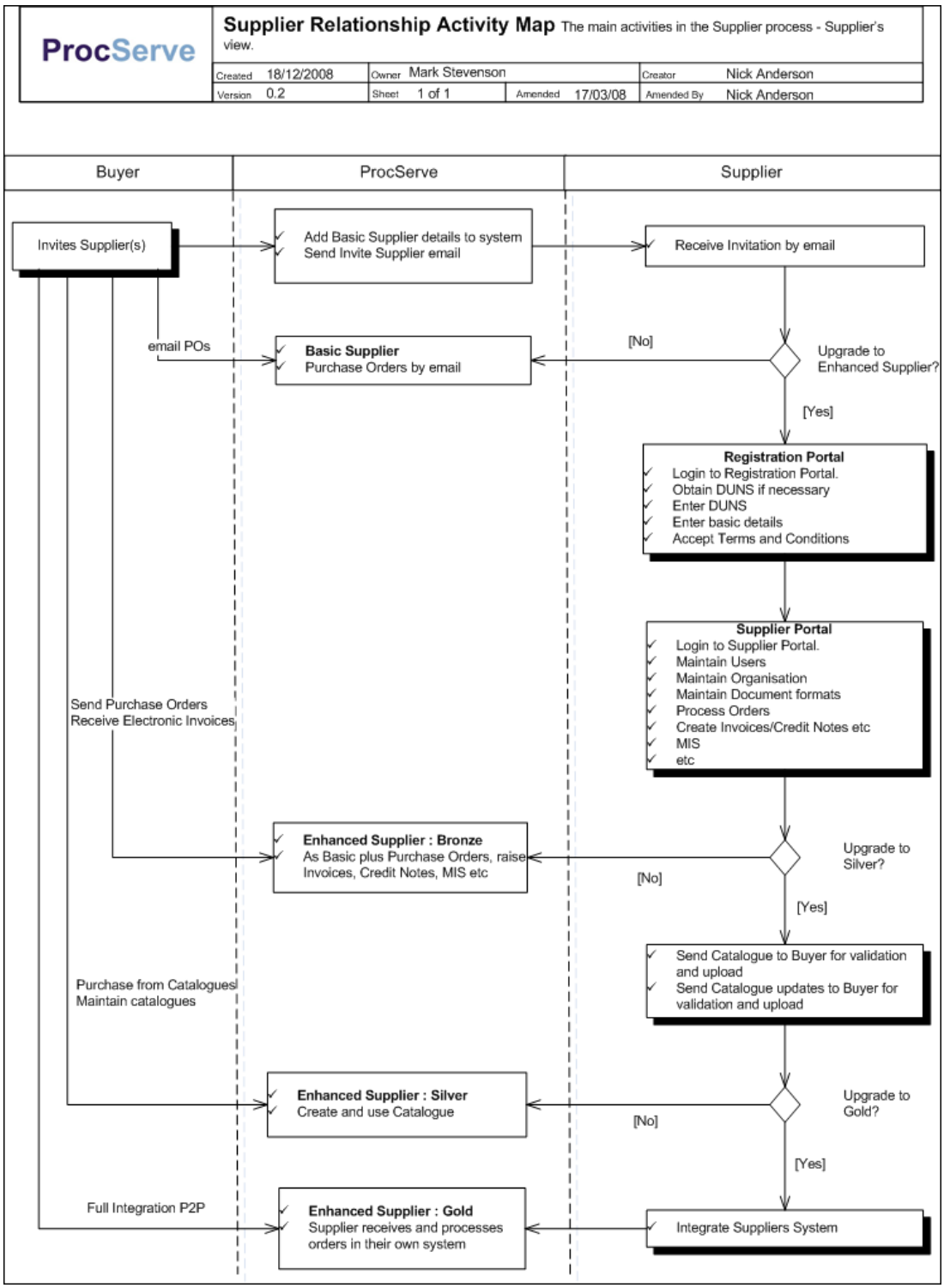
6.2 About ProcServe Suppliers and Buyers

This provides and overview of the supplier and buyer relationship.
You can view a map that describes how the ProcServe Trading Network enables supplier and buyer activities.

The following image shows the activities for each type of Supplier:



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The following list describes each activity in the above diagram:

- **Buyer: Invite Supplier(s)**. Buyers invite suppliers to join the ProcServe network. by providing basic details such as a contact name and email address. These basic details will be loaded into our system.

- **Supplier: Receive Invitation emails**. Three emails are sent to the Supplier:
  - A welcome email containing basic instructions and a link to the Registration Portal.
  - An email containing your User ID for the Registration Portal.
  - An email containing your Password for the Registration Portal.

- **Supplier : Registration Portal**. As a basic supplier you can only receive orders as PDF attachments to emails from your clients. You can continue receiving your orders by email or you can go to the Registration Portal and register as a bronze enhanced Supplier.

- **Bronze Suppliers**. An bronze supplier can receive orders from buyers through the ProcServe Supplier Portal. Buyers will create requisitions that, when authorised are sent as orders to the supplier. Suppliers can receive orders and subject to validation and other checks can create invoices and credit notes automatically at the Supplier Portal. Suppliers can also access reports (MIS) about the documents and other work flow items.

- **Silver Suppliers**. Suppliers and buyers can work together to upload and make available catalogues that buyers can shop from and add items to requisitions. There is an initial phase of uploading, validating, configuring and releasing catalogues (including setting up authorisations). Once a catalogue is in use then updates can be made that are fully validated, checked and confirmed before being released. multi-buyer catalogues can be shared amongst several buying organisations and need to configured slightly differently.

- **Gold Suppliers**. Gold suppliers connect their back office systems directly to the ProcServe Trading Network. This means they can process and respond to orders electronically in their own applications.

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6.3 Catalogue Import Matrix

This provides a list of the activities involved in catalogue import.

Key to table below:

Activities? ☑ Indicates that the Activity is relevant for the process. ☒ Indicates that the Activity is not relevant for the process.

Who Does What? The Buyer does this. The Supplier does this. This may be automated.

The following table lists the activities (e.g. Create ProcServe Catalogue Builder) and processes (e.g. Single Buyer Update) involved in catalogue imports and indicates whether the activity is relevant for the process and who carries out the activity:

Activity	Single Buyer New	Multi-Buyer New	Single Buyer Update	Multi-Buyer Update	Images	Delivery charges
Create ProcServe Catalogue Builder (PCB)	☑	☑	☑	☑	☑	☑
Import BMECat File	☑	☑	☑	☑	☑	☑
Check Validation Issues	☑	☑	☑	☑	☑	☑
Supplier Admin Review and Approval	☑	☑	☑	☑	☑	☑
Create Contract and Price File	☒	☑	☒	☑	☒	☒
Set Catalogue to Multi-Buyer	☒	☑	☒	☒	☒	☒
Configure Process Profile	☑	☑	☒	☒	☒	☒
Setup Validation Rules	☑	☑	☒	☒	☒	☒
Release Catalogue	☑	☑	☑	☑	☑	☑
Notify all Organisations	☒	☑	☒	☑	☒	☒
Buyer Review and Confirm	☑	☑	☑	☑	☑	☑
Export Profile	☑	☑	☑	☑	☑	☑

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6.4 Quick Tips

BUYER PORTAL	**Logging in to the portal**	• The password in case sensitive. • Your account will be locked if you enter your password incorrectly 3 times
	Supplier directory	• You can click the email field to send an email to us if you have a local mail program installed, for example Outlook. • Click the download as vCard link to download the supplier details as a vCard. When you click the link a prompt will appear. You can save the vCard to your computer and import it onto your mail program later.
	Supplier management	• The Top Targeted suppliers tab provides quick access to your most used Suppliers. • Clicking the blue flag will add the Supplier to the Top Targeted suppliers list. From here you can ensure that you focus your supplier adoption strategy on the suppliers that are more important to your organisation.

CATALOGUE	**Opening the BMECat file**	• Excel Macros. If you have got macros turned off in Excel and you cannot open this file you will have to turn them on: Open Excel. Go to **Tools (Menu bar) >> Options >> Security (Tab) >> Macro Security (Button)**. Select **Medium** security. Close Excel. When you open the ProcServe Catalogue Builder you will need to select enable macros from the prompt.
	BMECat file loading	• You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.
	Removing catalogues	• Catalogues cannot be deleted. If you want to remove the catalogue so its no longer viewable, use the Export Revoke functionality.
	Exporting your catalogue profile (single and multibuyer catalogues)	• It is advised that the export of catalogue updates is scheduled for out of business hours as this will prevent the catalogue from disappearing from a user's view. The time stated in the export profile determines the time updated catalogue is exported. This does not affect the initial catalogue as this is scheduled manually in the export schedule. • When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC tree structure until the search index. The search index is scheduled to run 23:00 daily. Once this is complete you can use the keyword search to find items. Therefore it is recommended automatic export is scheduled to run after hours but before 21:00 (just allow enough time for the export to run – depending on the size of the catalogue, the export time will vary). • Use 24hr clock (14:00 instead of 2:00) when scheduling a catalogue export. A date CANNOT be entered in the export Profile of a catalogue. If you want to export a catalogue on a specific date then this must be entered in the export schedule. • For catalogue updates Only: If a time is entered in the export Profile, the catalogue will export at the specified time automatically once it has been approved by the buyer. • The export schedule is used for the initial catalogue export. The initial catalogue export should be run immediately.
	Loading catalogue with images	• If you are uploading images you should perform the image upload before the catalogue is exported. • You can use jpeg, png and gif image formats. • Each individual image needs to be a reasonable size (for example under 100kb). The catalogue system does not resize images. Images are displayed as thumbnails in the Marketplace therefore having large images will only take a while to load on the page. • The image name and extension must match that in the PCB. • All images must be zipped before they are uploaded.

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		• The Zip file when opened should only display a list of images and nothing else. If you open a Zip file and see another folder in this file, the images will not load. The catalogue system looks to extract the image files from the zip but will be unable to find them if they are hidden within a folder.
	Catalogue with expiry dates	• Items entered with a expiry date will automatically be removed from the system when they reach their expiry date. • Suppliers should use offline reminders to ensure a revised catalogue is loaded in time.
	Validation Profiles	• The PCB will check for many errors, therefore it may not be necessary to set a validation rule to Error. • Choose the 'Error' evaluation wisely! • It may be useful to standardise validation rules across your catalogues or certain commodities. • Changing a Validation Rule will apply across all catalogues and therefore should not be amended. If you require a specific rule, create a new rule.
	Process Profiles	• Process profiles cannot be copied. • For Multi Buyer Catalogues - amending the Process Profile will affect all buying organisations.

SHOPPING	**Basket**	• Unless you cancel the purchase or checkout, your basket and its items will be cached. So the next time you log in to the Marketplace, your items will still be in your basket.
	Comparing items	• You can keep adding items to the comparison list until you are ready to compare. So you can switch between the compare items list and the window you were shopping in.
	RFQ	• In the RFQ overview page if the ppen RFQs list is empty you can click the create a new RFQ link to display the wizard. • When the ppen RFQs list is empty the create a new RFQ link is displayed. You can click this link to start the create new RFQ wizard.
	Searching	• When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC Tree Structure until the Search Index has run. The search index runs daily at 23:00. Once this is complete you can use the keyword search to find items. • If you know the manufacturer's number, use this as a starting point. • Try to be more specific when putting in search terms (if you want to look for A4 paper then do not search for paper as this term is too wide). • If you have a catalogue number then use this as a search term. • If you want to search for a product from a particular supplier then use the advanced search functionality. • If you see a result that looks as if it shouldn't have been returned, look at the item in detail as the search term will be in one of the other fields. • Use the slider bar to vary the way the system searches across the searchable fields. • If you have a word that is made of two separate words (e.g. earplugs) break it down into individual words (e.g. ear plugs). • Searched words can appear in any order within any of the searchable fields. • If you know a product in a particular way (e.g. packing tape) and you get no results when searching, try searching for variations (e.g. parcel tape). • If you have problems finding supplier catalogues or products and have exhausted all other tips and hints, please call or email the ProcServe service desk. • Do not try to search for words such as *a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, their, the, then, there, these, they, this, to, was, will, with* etc. as they will be excluded from the search. • If you need further help or guidance, please use the online help

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		function.

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6.5 Troubleshooting

I cannot find a supplier in the supplier directory	Try changing search term as the organisation may have registered their full name or with a different abbreviation.
	Try searching by the supplier's DUNS.
	Contact the supplier to confirm their details.
I don't understand why I am getting some results in my supplier directory search	The search does not only run on the supplier name other information the supplier provides such as whether they provide recycled goods is also searched against.
I cannot delete a user	You will not be able to delete users due to audit requirements however you should disable any user accounts that are no longer required.
I cannot see the private catalogues that I am loading in my classification view	Confirm that the catalogue was imported against your organisation by checking the header in the catalogue builder matches exactly the organisation in the portal.
	Confirm that the catalogue management system export was successful.
	Contact ProcServe helpdesk to ensure the correct assigned buyer has been set.
My shopping cart has contents in it that I didn't add	Some organisations will have requested to have shopping carts saved if the user closes the session without checking out therefore if you did this last time that will be why items are in the cart.
I cannot find the same products as my colleague	The solution supports what are known as classification views which control what content can be seen by different users which would explain why you cant see what someone else can if you have different views assigned.
I have loaded a catalogue and have assigned to a classification view but my users cannot see the items within the marketplace	The item will be searchable using the UNSPSC structure, however you will need to wait for the search index to run for your users to find the item using the standard search feature.

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How can I find a item which has a " / " in the description?	If you are searching for an item with a " / " eg 26/6 Staples, the / is ignored by the search engine. This means that when you search for "26/6 staples" the search engine searches for "26 6 staples", which means that 26/6 staples are not found. To overcome this, use the search term "26?6 staples" as the ? denotes any one character.
I wish to add additional buyers to an existing catalogue	**Symptoms**: If you have asked the Service Desk to add additional buyers to a multi-buyer catalogue that has already reached 'Update Expected' the Catalogue may go to "Supplier Review - Please solve all errors!" and all the items marked will be marked as 'Errors'. **Cause**: This is an expected system state as the Catalogue will be waiting for a price file for the new buyer. **Resolution**: Load a price file for the new buyer and click 'Validate' to clear the errors. This will move the task onto "Release the Catalogue" and continue following the process in the normal way until its reached "Update Expected" again.

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6.6 Glossary

The glossary provides a list of terms and definitions used in the system.

Term	Description
AID (Re ProcServe catalogue Search)	Article ID. The item number.
Approval Plan (re P2P)	A list of business rules defining what happens to either a requisition or purchase order after it is submitted by a user. Approval Plans contain approval criteria and notification controls.
Assortment catalogue (re ProcServe Catalogue Manager)	(See also Buyer Catalogue). A Catalogue created from a Multiple Buyer (or source) Catalogue for a single Buyer. The Catalogue may contain all or any assortment of items derived from the Multiple Buyer Catalogue and may be enhanced with Buyer specific data. When the contents of an Assortment Catalogue is defined, the item data is not copied but referenced to the original source Catalogue.
Audit Trail (re P2P)	A list of all actions that occur during the processing of a requisition or purchase order that ProcServe Purchase to Pay records and automatically time and date stamps, which is visible to all the parties who have permission to view the order.
BASDA	Business Application Software Developers Association.
BME (Re ProcServe Catalogue Builder & ProcServe Catalogue Manager)	The Bundesverband Materialwirtschaft, Einkauf und Logistik . (The Federal Association for Material Management, Purchasing and Logistics, based in Frankfurt Germany.)
BMEcat	BMEcat data format is a widely used international standard for the exchange of product data catalogues between Supplier and purchasing Organisations. This standard is used by the ProcServe Trading Network for the creation and exchange of Catalogue data within the ProcServe Catalogue Builder, ProcServe Catalogue Manager and ProcServe Catalogue Search. {Web: http://bmecat.de}
Browser	The user interface to the ProcServe Trading Network is through your standard Web browser (example Microsoft Internet Explorer or Netscape Navigator).

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Term	Description
Buyer Catalogue (Re ProcServe Catalogue Manager)	(See also Assortment Catalogue). A Catalogue created from a Multiple Buyer (or source) Catalogue for a single Buyer. The Catalogue may contain all or any assortment of items derived from the Multiple Buyer Catalogue and may be enhanced with Buyer specific data. When the contents of a Buyer Catalogue is defined, the item data is not copied but referenced to the original Source Catalogue.
Catalogue Context (Re ProcServe Catalogue Manager)	The selection of a Catalogue with which it is intended to work.
Catalogue Edition (Re ProcServe Catalogue Manager)	Editions are used so that the history of a Catalogue can be managed coherently. A Catalogue always has one current edition, in which changes, validations and other operations are made and is identified with a name and description. There can be multiple versions of each edition.
Catalogue Status (Re ProcServe Catalogue Manager)	Provides information about the process steps that are currently being carried out within the Catalogue.
Catalogue Version (Re ProcServe Catalogue Manager)	Several versions can exist of one Catalogue edition. The version number is incremented from within the Catalogue edition and is usually used to record a major revision to the data. Catalogue Versions can be created manually and are also created automatically before each import.
Check Data (re ProcServe Catalogue Builder)	The process of running macros to test and validate Catalogue data in the ProcServe Catalogue Builder before the creation of the BMEcat file.
Class Code	The product classification code associated to an item. It is mandatory in ProcServe Trading Network catalogues that all items are coded to the UNSPSC.
Cookie	A cookie is a small piece of data which is sent from a website to a web browser and stored locally on a users PC. The use of cookies enables a Web site to become more interactive with its users. The ProcServe Trading Network uses session cookies to ensure that a user is recognised when they move from page to page within the Marketplace and that any information entered is remembered. Unlike normal cookies, session cookies are deleted from the users PC when they log out.
CPV	Common Procurement Vocabulary. A product classification system derived from the UN Common Procurement Classification and adopted as an EU standard. Used for public procurement and public sector reporting and used to drive OJEU Notices. {Web: http://www.simap.eu.int}

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Term	Description
CSV	Comma Separated Value. A flat file format sometimes used for data import or export.
cXML	Commerce eXtensible Mark-up Language. (see also XML). A standard, defining acceptable formats and content, for sending documents by electronic means.
Data Key	The individual or combined elements or properties of data that are used to determine the uniqueness of a Catalogue item.
DUNS Numbers	Dun and Bradstreet Number. DUNS numbers (or correctly D-U-N-S Numbers) are issued, owned and solely maintained by Dun & Bradstreet Corporation and are used in the main for credit risk management and corporate authentication. The DUNS Number is a unique nine-digit identification sequence, which provides unique identifiers of single business entities, while linking corporate family structures together. When a business is entered into the D&B business information database each distinct business location that it has, is assigned its own DUNS Number.
EAN	European Article Numbering. Widely used bar code symbology used for product marking. Two versions of EAN exist. (See also UPC.) The EAN system is managed worldwide by EAN International {Web: http://www.ean-int.org}
eBis	Electronic Business Interchange Standard (see XML). A standard, defining acceptable formats and content, for sending documents by electronic means.
EBP	SAP Enterprise Buyer Professional. A procurement application which can be integrated for use as the P2P system within the ProcServe Trading Network.
eClass	A product classification system that has been developed to enable products, materials, merchandise and services to be organised in a logical structure. The system has four hierarchical levels. The highest level consists of 22 technical domains, which are divided into main groups, groups, and subgroups as leaf product classes. Each level is identified by a two-digit number, so that each subgroup can be identified by its eight-digit class number.
eForm	A document held electronically.

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Term	Description
ERP	Enterprise Resource Planning systems. (Example: Oracle, JD Edwards, SAP, or Peoplesoft) An industry term for the broad set of activities supported by multi-module application software that helps a manufacturer or other businesses manage the important parts of their business, including product planning, parts purchasing, maintaining inventories, interacting with Suppliers, providing customer service, and tracking orders. ERP can also include application modules for the finance and human resources aspects of a business. Typically, an ERP system uses or is integrated with a relational database system. The ProcServe Trading Network can integrate information into these systems.
ERS	Evaluated Receipt.
ETIM	Electrotechnical Information Model. A classification scheme for the electrical and electronics industry.
EUR	Euro (currency).
Explicit Item List (Re ProcServe Catalogue Manager)	An explicit item list is a list of items that is specifically included in or excluded from an assortment Catalogue.
FMS	Financial Management System.
FTR	Free Text Requisition.
Free Text Items	(see also Non-Catalogue Items). Goods or services added to a requisition which are not included in a Catalogue.
GBP	Great British Pounds (currency).
GPC	Government Procurement Card.
GTIN	Global Trade Identification Number. Generic term representing a family of global data structures including EAN, UCC and UPC.
Key	A database identification field not usually used in the GUI that uniquely identifies a data element.
LAN	Local Area Network. Usually your computer is attached to other computers and severs that reside internally within your Organisation. This is your organisation's LAN.
Lock(ed) Out	The inability of a user to login to the ProcServe Trading Network due to the freezing of their user account. A lockout occurs after 3 failed login attempts.

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Term	Description
Mass Edit (Re ProcServe Catalogue Manager)	The process of editing multiple items in a single operation.
Merchant Capacity	The Merchant Capacity indicates what level of VAT detail on purchases the merchant is able to provide to the buying Organisation. It should only be selected where Payments Accepted = Credit Card. The Merchant Capacity levels are 0 = does not accept credit cards; 1 = provides basic VAT information; 2 = provides Summary VAT information; 3 = provide Line Item Detail. In order to receive either Level 2 or Level 3 VAT information the buying Organisation must use a Purchase Card; Purchase Cards are only available to public sector Organisations.
MRO	Maintenance, Repair, and Operations. Products and services that Organisations must obtain to run their day-to-day business operations.
Multiple Buyer Catalogue (re ProcServe Catalogue Manager)	(See also Source Catalogue). A Catalogue created for the purpose of having more than one buying Organisation associated with it and contains data for more than one Buyer. Used to create Assortment Catalogues. Multiple Buyer Catalogues are not exported to ProcServe Catalogue Search.
Non-Catalogue Items	(see also Free Text Items). Goods or services added to a requisition that are not included in a Catalogue.
NSV	National Supplies Vocabulary. Product classification code originally developed by the NHS and used as a standard in UK government. Managed by Coding International {Web: http://codingit.co.uk}
OCI	Open Catalogue Interface. Used by SAP EBP applications to communicate with external Catalogue systems (eg ProcServe Catalogue Search).
OGC	Office of Government Commerce. The Office of Government Commerce is an independent office of the Treasury and works with public sector Organisations to help them improve their efficiency, gain better value for money from their commercial activities and deliver improved success from programmes and projects. {Web: http://www.ogc.gov.uk}
Buying Solutions	Buying Solutions is the trading arm of the Office of Government Commerce, which is itself an office of HM Treasury. It provides public sector procurement professionals with a route to the products and services they need to maximise procurement efficiency and value for money. Its contracts and framework agreements offer substantial savings through significant buying power, economies of scale

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Term	Description
	and strategic partnerships. Rigorous tendering and evaluation processes ensure that products and services are checked for quality, price competitiveness, fitness for purpose and compliance with statutory requirements. These products and services are available through Buying Solutions framework agreements, managed services and other procurement arrangements. More details are available on the website: http://online.ogcbuyingsolutions.gov.uk
OJEU	Official Journal of the European Union.
OPEN	Online Procurement for Education Needs. An eProcurement Marketplace solution designed specifically for schools.
P2P	Purchase to Pay or Procure to Pay. The procurement application used to connect to ProcServe Catalogue Search. The P2P used within the ProcServe Trading Network environment is ProcServe P2P.
PA Consulting	PA Consulting. PA Consulting Group is a leading management, systems and technology consulting firm. {Web: http://www.paconsulting.com}
Parametric Search	A method of searching catalogues that enables the user to define values for certain Catalogue fields. ProcServe Catalogue Search returns a list of items that match the search criteria.
PDF	Adobe Portable Document Format. A format that allows the conversion of virtually any document in virtually any application to be universally distributed read and stored.
Private Catalogue	Where a Supplier provides a Catalogue to a single buying Organisation under contract or agreement with that buying Organisation.
Process Profile (Re ProcServe Catalogue Manager)	The entire management process from import to release of data. Standard processes distribute tasks to responsible users and can automatically start operations like Catalogue exports.
Procurement Cards	In some buying Organisations, credit or charge cards which are used for purchasing supplies. (Also known as Purchasing Cards or GPC's)

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Term	Description
ProcServe Catalogue Builder (PCB)	The PCB is a Microsoft Excel spreadsheet used to contain data that defines catalogues and Catalogue item data. A macro (Check Data) can be run to check that the data is correctly formed. Once data has been checked a BMECat file (q.v.) can be generated. The BMECat file can then be imported onto the Catalogue Management system.
Public Catalogue	Where a Supplier provides a Catalogue for use by multiple buying Organisations under contract or agreement with Buying Solutions
Recurring Requisition	(see also Shopping Lists). A saved list of regularly purchased items. A recurring requisition can be used to add items to a requisition instead of searching catalogues.
Requisition (re P2P)	Request for purchase, which may consist of items from various Suppliers, grouped and ready to submit for approval or ordering. A requisition is usually converted into a Purchase Order, during or after approval.
RFQ	Request for Quote.
RMA	Return Material Authorisation. The generic term for a returns number issued by a Supplier under which goods are to be returned.
SAID (Re ProcServe Catalogue Search)	Supplier Article ID
Scrolling	If a list or page contents extends to. over a single page display, it is possible to scroll vertically or horizontally to read the hidden page content.
Search Engine	A tool which enables a user to search for items or documents based on information that they enter. A search engine returns a list of results which meet the search criteria.
SGML	Standard Generalised Mark-up Language.
Shopping Basket	The term used in ProcServe Catalogue Search to refer to a list of items that an individual is buying and wishes to return to their P2P application. The Basket is sometimes referred to as a “Cart”. In the P2P application a Shopping Cart is usually converted into, or added to a Requisition.
Shopping List	A saved list of items for adding to a Shopping List in ProcServe Catalogue Search. Shopping Lists can be used as templates or skeleton orders to avoid the need for searching catalogues.

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Term	Description
Source Catalogue (re ProcServe Catalogue Manager)	(See also Multiple Buyer Catalogue). A Catalogue created for the purpose of having more than one buying Organisation associated with it and contains data for more than one Buyer. Used to create Assortment Catalogues. Source Catalogues are not exported to ProcServe Catalogue Search.
Source File	The relative path and name or URL of a file.
SQL	Structured Query Language. A language used to obtain data from or modify data in a relational database.
SSO	Single Sign On.
Standard Supplier Catalogue (re ProcServe Catalogue Manager)	A Catalogue provided by a single Supplier which is associated with exactly one buying Organisation. A Standard Catalogue is exported to ProcServe Catalogue Search.
Target System (Re ProcServe Catalogue Manager)	The directory to which an exported Catalogue file is to be copied.
Thumbnail	A small preview of an image.
UCC	Uniform Code Council. (Also known as GS1US) The Organisation appointed by the UNDP as the code manager responsible for managing the UNSPSC Classification scheme. The code manager is responsible for ensuring compliance with the principles of the UNSPSC as well as the integrity of the code schema. The UCC is responsible for overseeing code change requests, industry revision projects, issuing regularly scheduled updates to the Code, communications with members, as well as special projects and initiatives as determined both by the UNDP and member requests {Web: http://www.gs1us.org and http://www.uc-council.org}.
UNDP	United Nations Development Program. The UNDP own all rights to the UNSPSC and appointed the Uniform Code Council (UCC) as code manager (Web: http://www.undp.org).
UNECE	United Nations Economic Commission for Europe.
UNECE Recommendation 20	The unit of purchase used in the ProcServe Trading Network. {Web: http://www.unece.org}

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Term	Description
UNSPSC	United Nations Standard Products and Services Code. An international standard product classification code structure developed jointly by the UNDP and D&B. Preferred classification code of the OGC and the mandatory classification system for the ProcServe Trading Network. (Web: http://www.unspsc.org).
UOM	Unit of Measure. Referred to in the ProcServe Trading Network as the Unit of Purchase. (See also UNECE Recommendation 20)
UPC	Universal Product Code. Widely used bar code symbology developed originally by the grocery industry, used for product marking. Five versions of UPC exist. (See also EAN.) An online database for UPC codes exists at: http:// www.upcdatabase.com.
URL	Uniform resource Locator. An internet address.
USD	United States Dollar (Currency).
Validation Rule (Re ProcServe Catalogue Manager)	A specific validation test for testing the quality of data. Validation Rules are grouped together to form Validation Profiles which can be associated with a Catalogue or Organisation.
VAT	Value Added Tax.
XML	Extensible Mark-up Language (see also cXML). A type of web page that allows large amounts of data to be shipped across the internet in a compact format while retaining the information in distinct fields, that can be used for integration with a database.
Zanzibar Managed Service	The Zanzibar Managed Service is the UK public sector eProcurement managed service delivered by ProcServe. It is available under a framework agreement to all English, Wales and Northern Irish public sector Organisations. Zanzibar is a web-based purchase to pay (P2P) and electronic Marketplace solution, It provides a common hosted platform for ePurchasing and eInvoicing.
ProcServe Catalogue Manager	The ProcServe Trading Network Catalogue Content Management System. The application into which the BMEcat file is imported for the creation, management and approval of Supplier catalogues. Catalogues are exported from ProcServe Catalogue Manager to ProcServe Catalogue Search.
ProcServe Catalogue Search	ProcServe Trading Network catalogue system. The application into which catalogues are imported from ProcServe Catalogue Manager, where they are hosted for

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Term	Description
	P2P and ERP systems to access.
ZIP File	A file that has been compressed for ease of transmission.
ZMP Forum	Zanzibar Marketplace Forum.

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